DOCUMENT RESUME

ED 164 889 08 CE 019 109

TITLE North Carolina Articulated Instructional Objectives Guide for Executive Secretary/Business Education (State Pilot Model).

INSTITUTION North Carolina State Dept. of Community Colleges, Raleigh.; North Carolina State Dept. of Public Instruction, Raleigh.

SPONS AGENCY Bureau of Occupational and Adult Education (DHEW/OE), Washington, D.C.

PUB DATE [Jul 78]

NOTE 250p.; For related documents see CE 019 107-111. Not available in hard copy due to light print in original document

EDRS PRICE MF-$0.83 Plus Postage. HC Not Available from EDRS.

DESCRIPTORS Articulation (Program); Behavioral Objectives; *Business Education; Community Colleges; *Course Objectives; Curriculum Development; Curriculum Guides; Models; Performance Criteria; *Postsecondary Education; *Secondary Education; *Secretaries; State Programs; Task Analysis; Technical Institutes; *Vocational Education

IDENTIFIERS *North Carolina; North Carolina (Duplin County)

ABSTRACT

This articulation instructional objective guide for executive secretary/business education contains summary information on sixteen blocks (courses) of instruction. They are the following: introduction to business, business mathematics, personal development, typing--beginning, records management, business machine--calculating, business machines--reproduction, typing--advanced, shorthand, accounting--basic, office procedures, data processing--concepts and control, machine transcription, word processing, office management, and business law 1. Information for the instructional blocks include these elements: list of job tasks, course description, instructional hours, instructional objectives, skills and related technical information to be taught, performance standards, standardized performance test items, and equipment requirements. Also included are recommended academic subjects for community college/technical institute secretary programs and high school business education programs, and job-task listing for executive secretary. Also available are the Project Report (CE 019 107), Policy and Procedures Guide (CE 019 108), and Instructional Objective Guides (CE 019 110 and 111). (JH)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED164889

U.S. DEPARTMENT OF HEALTH,
EDUCATION & WELFARE
NATIONAL INSTITUTE OF
EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

FOREWORD

This articulated instructional objectives guide is designed for use as a reference in the articulation of occupational programs and to foster competency based instruction and evaluation. It is intended primarily for use by instructors at the post-secondary level and teachers at the secondary level conducting like courses in the same occupational program. The guide considers commonalities in like occupational courses between high school and CC/TI (Community Colleges/Technical Institutes) programs in the same occupation and implements three basic concepts.

The commonality exists by virtue of the requirement by law that North Carolina community colleges and technical institutes conduct "Open Door" instruction in occupational programs. Obviously, such instruction must start from the beginning of the total occupational program, often resulting in duplication of instruction conducted in high school. This fact created the requirement for articulation which, if properly conducted, removes the need for the post-secondary student to repeat occupational instruction successfully completed at the secondary level. Such students usually require only the more advanced occupational instruction not received in their high school.

The three basic concepts involved in occupational program articulation between secondary and post-secondary levels of education are:

1. To ensure that occupational instruction conducted at the high school level is transferable for credit to the CC/TI in the same occupational program, it is essential that the occupational instruction components (courses) content be standardized so as to be identifiable with one or more like components at the CC/TI level.

2. To ensure that the student has acquired sufficient skill in job task performance to be given post-secondary credit for high school work, the teachers and instructors must both use the same task performance standards.

3. To ensure that student occupational qualification recognized for employment or course credit is both valid and reliable, it is necessary to standardize test items and procedures in the evaluation of student job task performance.

Instructional content standardization is based upon job tasks considered necessary for job qualification by the employers. The performance standards standardization is based upon the performance standards required by the industry, business or profession for initial job entry qualification. The ability to perform job tasks and meet initial job entry task performance standards recognized and accepted by employers must take precedence over personal opinions regarding standards or articulation cannot be readily accomplished. Test items and evaluation procedures for the same job task should be developed jointly by the instructors and teachers concerned.

TABLE OF CONTENTS

	Page
The Articulation Research Project	i
Members of State Business Education Advisory and Program Committee	i
Purpose of Instructional Objectives Guide	iii
Program Summary	vi
Recommended Academic Subjects for CC/TI Executive Secretary Programs	x
Recommended Academic Subjects for High School Business Education Programs	xi
Executive Secretary/Stenographer Job Task Listings	1.0-14.0
Summary Block 0.1 (Introduction to Business)	0.10
Summary Block 0.2 (Business Mathematics)	0.20
Summary Block 1.0 (Personal Development)	1.00
Summary Block 2.0 (Typing-Beginning)	2.00
Summary Block 2.5 (Records Management)	2.50
Summary Block 3.0 (Business Machines - Calculating)	3.00
Summary Block 4.0 (Business Machines - Reproduction)	4.00
Summary Block 5.0 (Typing-Advanced)	5.00
Summary Block 6.0 (Shorthand)	6.00
Summary Block 7.0 (Accounting - Basic)	7.00
Summary Block 8.0 (Office Procedures)	8.00
Summary Block 9.0 (Data Processing-Concepts and Control)	9.00
Summary Block 10.0 (Machine Transcription)	10.00
Summary Block 11.0 (Word Processing)	11.00
Summary Block 14.0 (Office Management)	14.00
Summary Block 16.0 (Business Law I)	16.00

ARTICULATION RESEARCH PROJECT
SIGNATORIES TO LOCAL AREA OCCUPATIONAL EDUCATION CURRICULUM
ARTICULATION AGREEMENTS

The following listed local area public school system and community college/ technical institute administrators have agreed to articulate their Secretarial Science - Business Education Program of instruction. Such agreements involve the employment of this document as an instructional objectives guide. High school students who successfully complete recognized articulated portions of this program and are evaluated as job qualified in work completed will be given appropriate credit for such work by the local area community college/technical institute.

Cumberland Area:

Howard E. Boudreau	President	Fayetteville Technical Institute Fayetteville, North Carolina
C. Wayne Collier	Superintendent	Cumberland County Public Schools Fayetteville, North Carolina
R. Max Abbot	Superintendent	Fayetteville City Schools Fayetteville, North Carolina

Duplin Area:

Carl D. Price	President	James Sprunt Institute Kenansville, North Carolina
Charles H. Yelverton	Superintendent	Duplin County Public Schools Kenansville, North Carolina

Martin Area:

Isaac B. Southerland	President	Martin Community College Williamston, North Carolina
R. Eugene Rogers	Superintendent	Martin County Public Schools Williamston, North Carolina

Mayland Area:

O. M. Blake, Jr.	President	Mayland Technical Institute Spruce Pine, North Carolina
Phil Geouge	Superintendent	Mitchell County Public Schools Bakersville, North Carolina
Harry McGee	Superintendent	Avery County Public Schools Newland, North Carolina
Edgar F. Hunter	Superintendent	Yancey County Public Schools Burnsville, North Carolina

Person Area:

Edward W. Cox	President	Piedmont Technical Institute Roxboro, North Carolina
Walter S. Rogers	Superintendent	Person County Public Schools Roxboro, North Carolina

Wayne Area:

Clyde A. Erwin, Jr.	President	Wayne Community College Goldsboro, North Carolina
John K. Wooten, Jr.	Superintendent	Wayne County Public Schools Goldsboro, North Carolina
William R. Johnson	Superintendent	Goldsboro City Schools Goldsboro, North Carolina

THE ARTICULATION RESEARCH PROJECT

Background: The Articulation Research Project was initiated on 1 September 1974 as a State Board of Education approved joint effort by the President of James Sprunt Institute and the Superintendent of the Duplin County Public Schools. It was and is supported by the North Carolina Occupational Research Unit, State Department of Public Education with funding provided jointly by the State Departments of Public Instruction and Community Colleges.

The occupational program instructors of James Sprunt Institute and the teachers from the Duplin County High Schools, assisted by appropriate occupational advisors, acting as a joint area committee were responsible for the development of the instructional material content of the initial articulated instructional objectives guide for this program. That guide was in turn updated, revised, and refined by a state level committee to provide a pilot model for a state articulated instructional objectives guide for this program. This guide will be used by all secondary and post-secondary institutions and teachers who have entered into local area articulation agreements for this program.

The state level committee that developed the revisions and refinements to the Duplin Area Committee produced guide consisted of representatives from each local area joint advisory and program committee for the occupation concerned that is operational in the areas of the state that have entered into local area articulation agreements. Each local area sent both secondary and post-secondary occupational teachers/instructors as representatives for each articulated program, plus at least one advisor for each program, to participate as the state advisory and program committee. Where possible, a state occupational education staff member from both the Department of Public Instruction and the Department of Community Colleges participated in the role of acting executive secretary for each joint state advisory and program committee. This committee acting as a whole performed the actions cited above. The joint state advisory and program committee members participating from the local areas and state staff personnel are listed below:

NORTH CAROLINA JOINT BUSINESS EDUCATION ADVISORY AND PROGRAM COMMITTEE

Dr. R. Jean Overton	Acting Executive Secretary	Ass't. Dir. Business Programs, Department of Community Colleges
Katherine Meadows	Ass't. Executive Secretary	Consultant, Business and Office Education, Dept. of Public Instr.
Annette S. Talton	Advisor, Wayne Area	I.C.I. United States, Inc. Pikeville, N.C.
Arlene G. Talton	Advisor, Wayne Area	Town of Mt. Olive Mt. Olive, N.C.
Shelton Norris	Advisor, Cumberland Area	Southern Nat'l. Bank Fayetteville, N.C.

Judy Weathersby	Advisor, Wayne Area	Wayne Community College Goldsboro, N. C.
Herman Kight	Instructor, Duplin Area	James Sprunt Inst. Kenansville, N.C.
Anne M. Waters	Instructor, Wayne Area	Wayne Community College Goldsboro, N.C.
Kenneth H. Neal	Instructor, Wayne Area	Wayne Community College Goldsboro, N.C.
Judy O'Daniel	Teacher, Wayne Area	Wayne County Schools Wayne County, N.C.
Jean A. Hollowell	Teacher, Wayne Area	Wayne County Schools Wayne County, N.C.
Patricia L. Wells	Teacher, Wayne Area	Wayne County Schools Wayne County, N.C.
Richard C. Jarvies	Instructor, Cumberland Area	Fayetteville Tech. Inst. Fayetteville, N.C.
Janice Gaskin	Teacher, Cumberland Area	Cumberland County Schools Cumberland County, N.C.
Barbara S. Mitchell	Teacher, Cumberland Area	Cumberland County Schools Cumberland County, N.C.
Marilyn M. Fowler	Teacher Cumberland Area	Fayetteville City Schools Fayetteville, N.C.
Elizabeth B. Price	Instructor, Martin Area	Martin Community College Williamston, N.C.
Beulah C. Peppers	Teacher, Martin Area	Martin County Schools Martin County, N.C.
Cherie J. Taylor	Teacher, Martin Area	Martin County Schools Martin County, N. C.
Joyce M. Hardison	Teacher, Martin Area	Martin County Schools Martin County, N.C.
Patti Garland	Teacher, Mayland Area	Mitchell County Schools Mitchell County, N.C.
Wilhelmina Hensley	Teacher, Mayland Area	Yancey County Schools Yancey County, N.C.
Dr. Carlyle P. Woelfer	Project Director/Editor Instructional Objectives Guides	James Sprunt Institute Kenansville, N.C.
Carla Gaiser	Typist	

ARTICULATION RESEARCH PROJECT

Purpose of Instructional Objectives Guides

Articulated instructional objectives guides are expected to serve the following purposes:

1. Serve as the primary vehicle for the articulation of subject matter in like occupational programs between the high schools and the technical institutes/community colleges, through use by instructors at both levels.

2. Provide a listing of the minimum tasks that a worker is expected to perform in the conduct of a specific level job in the occupation of concern.

3. Identify the primary detailed instructional objectives which are based upon the task listing. The tasks are listed in the sequence of complexity, with the least complex tasks being listed first, except where a task must be performed as a prerequisite to performance of another. The sequence of task listing is expected to influence the sequence of instruction. Task listings are internally grouped as duties or blocks of instruction.

4. Identify the skills (Process Objectives) and related technical information which must be taught and learned to accomplish the instructional objective. These represent the minimum skills and related information required for adequate occupational proficiency in task performance.

5. Designate the instructional contact hours considered necessary to conduct the required instruction. This is an estimate by the instructors of the area program and advisory committee as to the time required to teach the average learner to perform the task and, in most cases, to provide the opportunity to the learner to perform more than one practical work exercise to gain occupational proficiency. This time estimate is based upon the assumption that the instructor will have available the essential equipment, facilities, and instructional aids required to conduct the instruction, with the class size limited to the number of students shown on the equipment list.

6. Identify the performance standards to be met for occupational proficiency in the task. Performance standards used are those considered to be minimum business or industry standards such as are found in the professional standards guides issued by occupational associations of the business or industry. The standards are those which the learner must be capable of meeting upon completion of his program or course of instruction, if he is to be considered as qualified to perform at a specific job level or a specific job, in the occupation of the program. The ability to meet the listed standards of performance will also be considered as qualification for advanced instruction in that occupational program.

7. Provide a guide in the conduct of sequential occupational competency instruction by duties or blocks, resulting in qualification by the learner to perform limited skill specialist jobs of progressively higher skills until the program objective is reached, ie: file clerk to executive secretary; brake technician to automotive mechanic, etc. Unless it is essential that a learner be given

instruction in a specific block or duty as a prerequisite for instruction in a subsequent block, the complexity sequence established should be followed. As the learner becomes proficient in the performance of tasks in successive more complex blocks, he gains more marketable competencies that are indentifiable as the lower level job qualifications of a specialist, while working towards higher skills. This provides an opportunity for even the slow student to eventually gain sufficient skills to perform adequately as a specialist at some level in the occupation, despite the fact he may lack the ability to complete the program. The same holds true for the learner who has progressed satisfactorily through "several" initial blocks of occupational instruction (depending upon the program) and then for some valid reason is unable to complete the program or must leave school. Such flexibility in a program of instruction permits the maximum number of students to benefit from the instruction. Standardized sequences of instructional block presentation also ensure that lateral articulation can be practiced between the high schools of a local area and simplifies vertical articulation of subject matter with the local post-secondary institution.

8. Provides a listing of equipment required to conduct the program of instruction. Equipment listed is that considered to be the type and quantity essential for the conduct of instruction leading to job qualification in the occupation, with the class limited to the size stated. If class size exceeds the number for which the equipment is provided, instruction will normally be degraded or take longer. In some cases, expensive items of equipment, that have limited use, can be shared between schools, if adequate transportation and scheduling support is provided by the county school office. In some instances it may be possible to delay teaching of several tasks involving special equipment and then arrange to take the class to the location of such equipment for instruction.

9. Provide a list of standardized performance test items to be used in the determination of occupational proficiency. The test items attached to each block of instruction are for the most part "outline type" test items, showing the test objective, since they lack the specific detailed information which must be provided for use as a performance evaluation vehicle. This would be provided at the time of use. These test items are designed to be valid and reliable means of evaluation of proficiency in the performance of a specific task. Performance standards are provided with each test item. The test items listed cannot be easily compromised, as long as the specifics are not provided, and could be used as study guides.

10. It is recognized that there may be unlisted tasks that some employers may require the worker to do in the occupation, when in their employment. The tasks listed are the <u>minimum requirements</u> for qualification for the job under average circumstances on a regional basis. The tasks are not limited to a specific area employment situation or employer. Instructors may teach more skills and related technical information than is shown in the guides. Such information should be limited to the students who have completed the requirements for the tasks concerned in the instructional objectives guide. Normally the addition of tasks to those in the guide should be based upon local committee agreed area requirements and be taught by all schools teaching the block of instruction.

11. Up-dating and correction of items in the instructional objectives guides: Teachers/instructors are encouraged to view the instructional objectives guides critically in an effort to ensure that the contents are valid and current with

business and industry requirements. Recommendations for change or correction should be submitted to the executive secretary of the committee, who should then assemble and present them to the advisory and program committee as a whole, for review and possible adoption.

12. Instructional Blocks (Duties): Under normal circumstances the instructor/teacher should not plan to conduct instruction in a given articulated block of instruction unless the capability exists to conduct all of the instruction to meet the instructional objectives, with the result that the successful learner is occupationally qualified to perform the tasks identified with the block. This of course means that in several cases the high schools will lack the capability to conduct a full program of instruction owing to lack of resources or instructor time. In such situations, the successful learner, on leaving high school, is certified as qualified as a limited skill specialist or lower level job in the occupation can seek employment at that level or he can go on to the local post-secondary institution and complete the program. The front cover sheet for each block of instruction shows the total instructional contact time allocated for high school instruction and for the post-secondary institution. In most cases, the high schools are allocated more time for the same instructional block owing to the usually large classes, limited physical resources, often less learner maturity, at times less laboratory time, and more administrative interruptions. However, there may be instances where the high schools are allocated less time in a given instructional block. This is caused by the fact that the post-secondary institution covers the block (Automotive Electrical Systems) in its entirety, for occupational qualification, whereas the high schools will be expected to cover only that part related as a prerequisite or parallel to another block. In this case, conduct of a portion of the block instructional objectives is appropriate. The overall philosophy to be applied in occupational programs is that it is better to ensure that the learner is fully qualified to perform all of the tasks in a limited group of blocks or modules in an occupation and qualify as a specialist, than to be only familiar with a large number of tasks and occupationally qualified to perform none of them.

13. Most occupational programs will contain certain basic blocks of instruction without which a student would not be considered occupationally qualified at any level. Such blocks are normally identified as blocks 0.0 to 1.0 and on occasions blocks 2.0 and 2.5. Such blocks usually are base blocks and should be taught early or first in the program sequence.

Prepared and Published by: Occupational Education Research Project, Articulation of Occupational Education Programs Between Secondary Schools and Technical Institutes/Community Colleges; c/o James Sprunt Institute, P. O. Box 398, Kenansville, North Carolina, 28349; Carlyle P. Woelfer, Ed.D., Project Director.

INSTRUCTIONAL OBJECTIVES GUIDE

SUMMARY August 1977

PROGRAM: Executive Secretary (DCC T-030)
Stenographer/Business Education (High Schools)

COURSES: Introduction to Business (Block 0.1)
Business Mathematics (Block 0.2)
Personal Development (Block 1.0)
Typing (Beginning) (Block 2.0)
Records Management (Block 2.5)
Office Machines (Calculating) (Block 3.0)
Office Machines (Reproduction) (Block 4.0)
Typing (Advanced) (Block 5.0)
Shorthand (Block 6.0)
Accounting (Basic) (Block 7.0)
Office Procedures (Block 8.0)
Data Processing (Concepts & Control) (Block 9.0)
Transcription Machines (Block 10.0)
Word Processing (Block 11.0)
Office Management (Block 14.0 - Business Administration)
Business Law (Block 16.0 - Business Administration)

Note: Initial Blocks - 0.1, 0.2, 1.0, 2.0, 2.5, 3.0, 4.0, 7.0 and 9.0 also apply to Business Administration and Accounting Programs at the post-secondary level.

COURSE IDENTIFICATIONS:

Department of Public Instruction
Personal Development* - No course number
Typing (Beginning) (I) No. 6111
Records Management*
Office Machines (Calculating)*
Office Machines (Reproduction)*
Typing (Advanced) (II) No. 6112
Shorthand (I & II) No. 6212 and 6213
Accounting (Bookkeeping) (I) No. 6332
Data Processing - Concepts and Control
Office Procedures (Office Practice) No. 6410 or 6431
Introduction to Business No. 6010a
Business Mathematics No. 6910
Word Processing No. 6422
*Note: Usually taught as part of 6410 or 6431 in high schools

Department of Community Colleges (T-030)
Personal Development - HYG 101
Typing (Beginning) (I & II) BUS 102 & 103
Records Management BUS 112
Office Machines (Calculating) (I) BUS 211
Office Machines (Reproduction) (II) BUS 212
Typing (Advanced) (III, IV) BUS 104,205
Shorthand (I, II, III, IV) BUS 106, 107, 108

Advanced Shorthand (I & II) BUS 206, 207, & 208
Accounting (I) BUS 120
Transcription Machines BUS 210
Word Processing BUS 273
Data Processing (Concepts & Control) EDP 104
Office Procedures BUS 215
Introduction to Business BUS 101
Business Math MAT 110
Office Management BUS 271
Business Law I BUS 115

SECRETARIAL (CC/TI) AND STENOGRAPHIC (HIGH SCHOOL) BUSINESS RELATED INSTRUCTIONAL CONTACT HOURS:

Community Colleges/Technical Institutes: 1206 or 1283
High Schools: Total 1260 or 1440

INSTRUCTIONAL OBJECTIVES (Secretarial/Stenographic Courses):

Instructional Hours CC/TI/HS	
Block 0.1 (33 hrs/180 hrs)	Introduction to Business: To provide the learner with a survey of the business world with particular attention paid to information regarding the structure of various types of business organizations, methods of financing, internal organizations and management.
Block 1.0 (30 hrs/30 hrs)	Personal Development: To provide the learner with the ability and knowledge to be better qualified to succeed in business occupations by developing socially desirable practices/habits in personal body care, grooming and dress, ethics, interpersonal relationships, and attitudes towards work, reliability, and honesty.
Block 2.0 (165 hrs/180 hrs)	Typing (Basic): To develop touch typewriting competency, speed and accuracy, and typing techniques at the lowest job level and job qualification speed as applied to tabulation, manuscripts, correspondence, business forms, stencils, and duplicator masters.
Block 2.5 (35 hrs/35 hrs)	Records Management: To provide the learner with broad background training in basic records management principles and techniques, to file accurately, quickly, and systematically.
Block 3.0 (30 hrs/30 hrs)	Business Machines (Calculating): To provide the learner with the techniques, processes, operation and application in the use of adding and calculating machines, with emphasis upon learning the touch system for ten-key adding machines.

Block 4.0 (33 hrs/33 hrs)	Business Machines (Reproduction): To introduce the learner to a variety of reproduction equipment to be found in the modern office, and to develop proficiency in using common types of such machines, with emphasis upon the preparation and use of spirit master stencils and offset masters. Where possible, students should also be introduced to common image projection equipment, with emphasis on slides and transparencies.
Block 5.0 (165 hrs/180 hrs)	Typing (Advanced): To emphasize production typing problems to the learner and speed building to achieve qualification for initial entry at stenographic and secretarial job levels. To develop techniques needed by the learner in planning and in typing projects that closely approximate the work appropriate to the field of study. These projects include review of letter forms, methods of duplication, statistical tabulation, and the typing of reports, manuscripts, and legal documents.
Block 6.0 (330 hrs/360 hrs)	Shorthand: To develop job qualification skills in the learner in shorthand, plus providing typewriting, grammar usage, and their application in the production of mailable, typewritten transcripts.
Block 7.0 (55-88 hrs/180 hrs)	Accounting (Basic): To provide the learner with the principles, techniques, and tools of accounting to enable the learner to apply the mechanics of accounting. To develop in the learner the ability to collect, summarize, and report information about service and mercantile enterprises.
Block 8.0 (143 hrs/360 or 180 hrs)	Office Procedures: High Schools - To provide the opportunity to qualify the learner to perform basic records management tasks (Block 2.5), to operate common business machines (Calculating-Block 3.0) and (Reproduction-Block 4.0) plus personal development (Block 1.0). CC/TI and High Schools - To provide the opportunity for the practical application of office related skills and knowledge previously acquired in the program of instruction in an actual or simulated office environment. To provide instruction and training on secretarial (CC/TI) and stenographic (high school) duties.
Block 9.0 (33 hrs/none)	Data Processing (Concepts & Control): To provide the learner with a working knowledge of the basic theory of data processing how to work with computer concepts, how to perform data batch control, and how to perform processed data control.
Block 10.0 (33-55 hrs/familiarization)	Machine Transcription: To qualify the student in the operation and use of the transcription machine and to further develop professional ability in the application of correct grammar, word usage, punctuation, and accuracy while producing mailable copy from machine transcribed dictation for all types of communication forms.

Block 11.0 (33-55 hrs/90-180)	Word Processing: (a) To develop necessary skills and to provide practical experience in the planning, administration, and operations of a word processing center applicable to larger offices; (b) To further develop skills in high speed manipulative techniques on a power key board, proofreading and document revision, use of machine transcription, production of mailable copy from magnetic media and rough drafts, file log, and maintain magnetic media, originate correct formats and apply the appropriate code for the format and determine work priorities.
Block 14.0 (55 hrs)	Office Management: To provide the learner with the fundamental principles of office management, with emphasis on the functions of the office manager and how they are performed, office automation, planning processes, controlling, organizing, and actuating office problems.
Block 16.0 33 hrs)	Business Law I: To inform the learner regarding certain fundamentals and principles of business law, including contracts, negotiable instruments, and agencies.
Block 0.2 (55 hrs/180 hrs)	Business Mathematics. (Not taught as Business Course CC/TI) To develop skills in the application of mathematics to business problems such as payrolls, pricing, interest, taxes, etc.

Academic and Non-Business Education Courses suggested for the Executive Secretary Curriculum - at CC/TI level

	INSTRUCTIONAL CONTACT HOURS
Business Mathematics (MAT 110) or (BUS 109)	55
College Orientation (GUI 101)	11
English Grammar (ENG 111)	55
English Composition (ENG 112)	55
Oral Communications (ENG 204)	33
Applied Psychology (PSY 206)	33
Business Correspondence (ENG 206)	33
State and Local Government (POL 103)	33
Non-Business Courses Total	308
Articulated Business Education Course Total	1283 or 1206
Grand Total CC/TI Secretarial Program	1591 or 1514

Non-Business Education Courses Suggested for Stenographic Program Curriculum

High Schools

	UNITS
English I, II, III	3
English (Business Communication)	1
General Math or Algebra	1
Business Math (If not taught as part of Business Program)	1
Physical Science	1
Biology	1
US Studies	1
Health and Physical Education	1
Electives	2
Academic Total	12
Business Education	8
Curriculum Total	20

ARTICULATION RESEARCH PROJECT

OCCUPATIONAL TASKS

BUSINESS ADMINISTRATION - SECRETARIAL SCIENCE
ACCOUNTING

Frequency that average worker will be required to perform the task.

Level of difficulty: Normally performed by skill level or levels checked.

BLOCK OR DIVISION: Personal Development 1.0 TASK: (In Order of Complexity)		SELDOM	WEEKLY	DAILY	LOWEST	INTERMEDIATE	HIGHEST
1.01	Use proper techniques for good body care.			x	x	x	x
1.02	Dress appropriately and maintain neat, well-groomed appearance.			x	x	x	x
1.03	Display proper attitude toward work.			x	x	x	x
1.04	Practice good business ethics.			x	x	x	x
1.051	Practice telephone courtesy.			x	x	x	x
1.052	Display physical poise.			x	x	x	x
1.053	Meet public tactfully.			x	x	x	x
1.06	Practice appropriate etiquette in public.			x	x	x	x
BLOCK OR DIVISION: Typewriting (Basic) 2.0							
2.01	Operate typewriter (manual and electric).			x	x	x	x
2.02	Prepare file labels.			x	x	x	x
2.03	Prepare postal cards.		x		x	x	x
2.04	Prepare copy from simple rough drafts with proofreader's marks.			x	x	x	x
2.05	Prepare envelopes and labels for mailing.			x	x	x	x
2.06	Prepare mailable memorandum.			x	x	x	x

ARTICULATION RESEARCH PROJECT

OCCUPATIONAL TASKS

BUSINESS ADMINISTRATION - SECRETARIAL SCIENCE
ACCOUNTING

Frequency that average worker will be required to perform the task.

Level of difficulty: Normally performed by skill level or levels checked.

BLOCK OR DIVISION: Typewriting (Basic) 2.0 (continued) TASK:		SELDOM	WEEKLY	DAILY	LOWEST	INTERMEDIATE	HIGHEST
2.07	Prepare letters (business and personal).			x	x	x	x
2.08	Compose simple copy at typewriter.		x		x	x	x
2.09	Make carbon copies.			x	x	x	x
2.10	Perform simple tabulation.			x	x	x	x
2.11	Prepare outlines.	x			x	x	x
2.12	Prepare manuscripts.		x		x	x	x
2.13	Prepare fill-in forms.			x	x	x	x
2.14	Prepare charts, tables and other tabulated reports.		x	x		x	x
2.15	Prepare simple agenda.	x					x
2.16	Prepare simple stencils and duplicator masters.			x	x	x	x
BLOCK OR DIVISION: Records Management 2.5							
2.51	Prepare folders and other filing material for use.			x	x	x	x
2.52	Sort and classify material.			x	x	x	x
2.53	Use filing equipment.			x	x	x	x
2.54	Requisition file material.		x		x	x	x

ARTICULATION RESEARCH PROJECT

OCCUPATIONAL TASKS

BUSINESS ADMINISTRATION - SECRETARIAL SCIENCE
ACCOUNTING

Frequency that average worker will be required to perform the task.

Level of difficulty: Normally performed by skill level or levels checked.

BLOCK OR DIVISION: Records Management (continued) 2.5 TASK:	SELDOM	WEEKLY	DAILY	LOWEST	INTERMEDIATE	HIGHEST
2.55 Charge out files.			x	x	x	x
2.56 Transfer inactive records.	x			x	x	x
BLOCK OR DIVISION: Business Machines Calculating 3.0						
3.01 Use printing and/or non-printing adding machines and calculators to complete the following business forms.			x	x	x	x
3.011 Orders						
3.012 Invoices						
3.013 Inventory						
3.014 Sales						
3.015 Bills						
3.016 Miscellaneous Accounts						
*BLOCK OR DIVISION: Business Machines (Reproduction and Projection) 4.0						
4.01 Operate collator.		x		x	x	x
4.02 Operate folding machine.	x			x	x	x
4.03 Operate automatic binder.	x			x	x	x
4.04 Operate postage sealer and meter.			x	x	x	x
4.05 Operate copiers (Thermal & Photographic).			x	x	x	x

*Note: Instructional emphasis should be based upon local area survey to determine most common equipment in use by business offices.

ARTICULATION RESEARCH PROJECT

OCCUPATIONAL TASKS

BUSINESS ADMINISTRATION - SECRETARIAL SCIENCE
ACCOUNTING

BLOCK OR DIVISION: Business Machines (Reproduction and Projection) 4.0 TASK:	Frequency that average worker will be required to perform the task.			Level of difficulty: Normally performed by skill level or levels checked.		
	SELDOM	WEEKLY	DAILY	LOWEST	INTERMEDIATE	HIGHEST
4.06 Operate overhead transparency projector.	x			x	x	x
4.07 Operate 35mm slide projector.	x			x	x	
4.08 Operate motion picture projector.	x			x	x	
4.09 Operate spirit duplicator.			x	x	x	x
4.10 Operate mimeograph.			x	x	x	x
4.11 Operate offset press.			x	x	x	x
BLOCK OR DIVISION: Typewriting (Advanced) 5.0						
5.01 Operate typewriter.			x	x	x	x
5.02 Prepare file labels.			x	x	x	x
5.031 Prepare postal cards.			x	x	x	x
5.032 Prepare envelopes and labels for mailing.			x	x	x	x
5.04 Prepare memorandum.			x	x	x	x
5.05 Prepare letters (business and personal).			x	x	x	x
5.06 Make carbon copies.			x	x	x	x
5.07 Prepare outlines.			x		x	x
5.08 Prepare press releases.			x		x	x

Note: See note at bottom of previous page.

ARTICULATION RESEARCH PROJECT

OCCUPATIONAL TASKS

BUSINESS ADMINISTRATION - SECRETARIAL SCIENCE
ACCOUNTING

Frequency that average worker will be required to perform the task.

Level of difficulty: Normally performed by skill level or levels checked.

BLOCK OR DIVISION: Typewriting (Advanced) 5.0 (Continued)

TASK:		SELDOM	WEEKLY	DAILY	LOWEST	INTERMEDIATE	HIGHEST
5.091	Prepare medical history.			x		x	x
5.092	Prepare fill-in forms.			x		x	x
5.10	Prepare agenda and minutes.		x			x	x
5.11	Prepare manuscripts.		x			x	x
5.12	Prepare copy from rough draft material with proofreader's marks.		x			x	x
5.13	Prepare stencils and duplicator masters.			x	x	x	x
5.14	Prepare technical and financial reports.			x		x	x
5.15	Prepare business forms.			x		x	x
5.16	Prepare charts, tables and other tabulated reports.		x			x	x
5.17	Prepare legal papers.			x		x	x
5.18	Operate automatic typewriter (optional).			x		x	x

- 5.0 -

ARTICULATION RESEARCH PROJECT

OCCUPATIONAL TASKS

BUSINESS ADMINISTRATION - SECRETARIAL SCIENCE
ACCOUNTING

BLOCK OR DIVISION: Shorthand 6.0

SUB-BLOCK: 6.10, 6.20, 6.30, 6.40

Frequency that average worker will be required to perform the task.

Level of difficulty: Normally performed by skill level or levels checked.

Task		SELDOM	WEEKLY	DAILY	LOWEST	INTERMEDIATE	HIGHEST
6.101A	Read Shorthand.			x	x	x	x
6.201A	Read Shorthand.			x	x	x	x
6.301	Read Shorthand.			x	x	x	x
6.401	Read Shorthand.			x	x	x	x
6.102A	Write Shorthand.			x	x	x	x
6.202A	Write Shorthand.			x	x	x	x
6.302	Write Shorthand.			x	x	x	x
6.402	Write Shorthand.			x	x	x	x
6.103B	Take Dictation.			x	x	x	x
6.203B	Take Dictation.			x	x	x	x
6.303	Take Dictation.			x	x	x	x
6.403	Take Dictation.			x	x	x	x
6.104B	Transcribe Shorthand Notes Accurately.			x	x	x	x
6.204B	Transcribe Shorthand Notes Accurately.			x	x	x	x
6.304	Transcribe Shorthand Notes Accurately.			x	x	x	x
6.404	Transcribe Shorthand Notes Accurately.			x	x	x	x

ARTICULATION RESEARCH PROJECT

OCCUPATIONAL TASKS

BUSINESS ADMINISTRATION - SECRETARIAL SCIENCE
ACCOUNTING

BLOCK OR DIVISION: Accounting 7.0

Frequency that average worker will be required to perform the task.

Level of difficulty: Normally performed by skill level or levels checked.

TASK:	SELDOM	WEEKLY	DAILY	LOWEST	INTERMEDIATE	HIGHEST
7.01 Journalize daily transactions.		x		x	x	x
7.02 Post transactions.					x	x
7.03 Close a set of books.				x	x	x
7.04 Keep accounts receivable and payable records.				x	x	x
7.05 Prepare a trial balance.				x	x	x
7.06 Maintain checking accounts.				x	x	
7.07 Reconcile a bank statement.					x	x
7.08 Prepare a worksheet.					x	x
7.09 Prepare financial statements.					x	x
7.10 Journalize adjusting and closing entries.					x	x
7.11 Close the ledger.				x	x	
7.12 Prepare payroll records.				x	x	
7.13 Special journals.				x	x	
7.14 Special journals.				x	x	
7.15 Maintain petty cash account.				x	x	
7.16 Maintain cash register system records.				x	x	
7.17 Maintain sales tax record.				x	x	

The performance frequency of the tasks in this block will be determined by the size and complexity of the business organization and the office activity involved. Large activities may perform the tasks daily whereas small organizations and offices may perform them weekly or less often.

ARTICULATION RESEARCH PROJECT

OCCUPATIONAL TASKS

BUSINESS ADMINISTRATION - SECRETARIAL SCIENCE
ACCOUNTING

BLOCK OR DIVISION: Accounting 7.0
(continued)

Frequency that average worker will be required to perform the task.

Level of difficulty: Normally performed by skill level or levels checked.

TASK:		SELDOM	WEEKLY	DAILY	LOWEST	INTERMEDIATE	HIGHEST
7.18	Compute and record bad debts.					X	X
7.19	Determine depreciation and disposal of plant assets.					x	x
7.20	Handle notes and interest.					x	x
7.21	Use the accrual accounting system.					x	x
7.22	Use automated data processing.				x	x	x
BLOCK OR DIVISION: Office Procedures (Secretary/Stenographer Duties) 8.0							
8.01	Perform limited housekeeping related to office equipment, supplies and office decor.			x	x	x	x
8.02	Process mail.			x	x	x	x
8.031	Make appointments.			x	x	x	x
8.032	Relay information as directed.			x	x	x	x
8.04	Requisition supplies and equipment.			x	x	x	x
8.05	Maintain inventory of equipment and consumables in office.		x			x	x
8.061	Maintain petty cash account for office.			x			x
8.062	Perform personal duties for employer when part of job description and ethical.		x				x

ARTICULATION RESEARCH PROJECT

OCCUPATIONAL TASKS

BUSINESS ADMINISTRATION - SECRETARIAL SCIENCE
ACCOUNTING

BLOCK OR DIVISION: Office Procedures 8.0
(continued)

TASK:		Frequency that average worker will be required to perform the task.			Level of difficulty: Normally performed by skill level or levels checked.		
		SELDOM	WEEKLY	DAILY	LOWEST	INTERMEDIATE	HIGHEST
8.07	Maintain record of events and changes in policies and procedures.			x	x	x	x
8.08	Perform receptionist duties.			x	x	x	x
8.09	Supervise other employees when required.			x			x
8.10	Handle business social activities.	x					x
BLOCK OR DIVISION:	Data Processing 9.0 (Concepts and Control)						
9.01	Know computer concepts.			x	x	x	x
9.02	Perform data batch control.			x		x	x
9.03	Perform processed data control.			x		x	x
BLOCK OR DIVISION:	Machine Transcription 10.0						
10.01	Operate transcription machine.			x	x	x	x
10.02	Perform operator care of transcription machine and machine transcriptions.			x	x	x	x
10.03	Produce draft documents of all types rapidly and accurately from machine transcriptions.			x	x	x	x
10.04	Prepare mailable copy in proper format from machine transcriptions.			x	x	x	x

ARTICULATION RESEARCH PROJECT

OCCUPATIONAL TASKS

BUSINESS ADMINISTRATION - SECRETARIAL SCIENCE
ACCOUNTING

BLOCK OR DIVISION: Machine Transcription 10.0 (continued)

TASK:		Frequency that average worker will be required to perform the task.			Level of difficulty: Normally performed by skill level or levels checked.		
		SELDOM	WEEKLY	DAILY	LOWEST	INTERMEDIATE	HIGHEST
10.05	Dictate material for machine transcription accurately and in proper format.		x		x	x	x
BLOCK OR DIVISION: Word Processing 11.0							
11.01	Know word processing terminology, definitions and usage.			x	x	x	x
11.02	Know how word processing concepts are employed in modern offices.			x	x	x	x
11.03	Communicate orally.			x	x	x	x
11.04	Transcribe from transcription machine.			x	x	x	x
11.05	Proofread and revise documents.			x	x	x	x
11.06	Operate power keyboard (automatic typewriter).			x	x	x	x
11.07	File, log, and maintain magnetic media.			x	x	x	x
11.08	Produce documents from magnetic media.			x	x	x	x
11.09	Originate document formats and use applicable coding.			x	x	x	x
11.10	Dictate documents onto magnetic media from printed or handwritten copy.			x	x	x	x

ARTICULATION RESEARCH PROJECT

OCCUPATIONAL TASKS

BUSINESS ADMINISTRATION - SECRETARIAL SCIENCE
ACCOUNTING

BLOCK OR DIVISION: Word Processing 11.0
(continued)

TASK:	Frequency that average worker will be required to perform the task.			Level of difficulty: Normally performed by skill level or levels checked.		
	SELDOM	WEEKLY	DAILY	LOWEST	INTERMEDIATE	HIGHEST
11.11 Use reprographic equipment.			x	x	x	x
11.12 File and maintain records.			x	x	x	x
11.13 Originate and dictate simultaneously from an outline documents that contain all essential information.		x		x	x	x
11.14 Make decisions and solve problems.			x	x	x	x
11.15 Manage own time and tasks and determine assigned task priorities.			x	x	x	x
11.16 Implement procedures and interpret flow of work within designated controls.	x					x
11.17 Supervise word processing center to include supporting personnel.			x			x

ARTICULATION RESEARCH PROJECT

OCCUPATIONAL TASKS

BUSINESS ADMINISTRATION - SECRETARIAL SCIENCE
ACCOUNTING

Frequency that average worker will be required to perform the task.

Level of difficulty: Normally performed by skill level or levels checked.

BLOCK OR DIVISION: Office Management 14.0

TASK:		SELDOM	WEEKLY	DAILY	LOWEST	INTERMEDIATE	HIGHEST
14.01	Plan, provide for and maintain first aid capabilities.			x		x	x
14.02	Plan and supervise safety rules and compliance.			x		x	x
14.03	Plan and supervise motor vehicle parking areas and grounds.	x				x	x
14.04	Supervise visitor reception and information.			x			x
14.05	Supervise mail room and message center.			x			x
14.06	Supervise cafeteria and/or rest facilities.			x		x	x
14.07	Supervise internal transportation services.			x		x	x
14.08	Plan/supervise custodial, facilities, utilities requirements/activities.			x		x	x
14.09	Ensure maintenance of office equipment.		x			x	x
14.10	Perform office equipment rental requirements.	x					x
14.11	Supervise office supply activities.			x			x
14.12	Supervise application employee conduct and standards.			x			x

ARTICULATION RESEARCH PROJECT

OCCUPATIONAL TASKS

BUSINESS ADMINISTRATION - SECRETARIAL SCIENCE
ACCOUNTING

Frequency that average worker will be required to perform the task.

Level of difficulty: Normally performed by skill level or levels checked.

BLOCK OR DIVISION: Office Management 14.0 (continued)

TASK:		SELDOM	WEEKLY	DAILY	LOWEST	INTERMEDIATE	HIGHEST
14.13	Plan for internal communications services.	x					x
14.14	Plan and make work flow sheets.	x					x
14.15	Plan office layout.	x					x
14.16	Make work schedules.		x				x
14.17	Plan office organization and staffing.	x					x
BLOCK OR DIVISION:	Business Law 12.0 (Accounting) Business Law 16.0 (Bus. Admin)						
12.01 16.01	Know basic principles of law and its enforcement.			x	x		
12.02 16.02	Know basic legal considerations of contracts.		x			x	
12.03 16.03	Know the legal considerations regarding sales.			x		x	
12.04 16.04	Know legal considerations of bailments.			x		x	
12.05 16.05	Know legal considerations regarding commercial papers.			x	x	x	x
12.06 16.06	Know legal considerations of agency and employment relationships.			x		x	x
12.07 16.07	Know the legal considerations of partnerships.			x			x

ARTICULATION RESEARCH PROJECT

OCCUPATIONAL TASKS

BUSINESS ADMINISTRATION - SECRETARIAL SCIENCE
ACCOUNTING

BLOCK OR DIVISION: Business Law 12.0 (Accounting)
Business Law 16.0 (Bus. Admin)

Frequency that average worker will be required to perform the task.

Level of difficulty: Normally performed by skill level or levels checked.

TASK:		SELDOM	WEEKLY	DAILY	LOWEST	INTERMEDIATE	HIGHEST
12.08 16.08	Know the legal considerations regarding corporations.			x			x
12.09 16.09	Know the legal considerations regarding risk-bearing devices.			x		x	x
12.10 16.10	Know the legal considerations regarding property.			x			x

ARTICULATION RESEARCH PROJECT

Instructional Objectives Guide August 1977

PROGRAM: Accounting (DCC T-016, Business Administration (DCC T-018), Executive Secretary (DCC T-030), Stenographer (DPI)

COURSE: Introduction to Business (Block 0.1)

COURSE DESCRIPTION: Department of Community Colleges No. BUS 101.
Department of Public Instruction No. 6010

INSTRUCTIONAL HOURS: High Schools: 180 hours
Community Colleges/Technical Institutes: 33-55 hours

INSTRUCTIONAL OBJECTIVES:

1. To provide information to the learner regarding the business world with particular attention devoted to the structure of the various types of business organizations, methods of financing, internal organization, and management.

2. To provide information to the learner regarding the basic economic problems and the knowledges essential for the individual to be an intelligent buyer, user, and producer of business goods and services, in a basically free enterprise system.

3. To provide information to the learner on topics related to the business world that will serve as a background and foundation upon which the business-related courses and programs are built, ie: the economic world, American business and the consumer, banking, credit, savings and investments, money management, insurance, communication, travel, taxation, transportation, career opportunities, and job application.

JOB QUALIFICATION:

This is an introductory and background type of course, serving only to provide related general information to the learner, and does not result in any type of occupational qualification.

PREREQUISITES: High Schools: None.
Community Colleges/Technical Institutes: None.

PERFORMANCE EVALUATION:

There are no performance requirements for this particular block of instruction or course. An appropriate number of standardized test items requiring written response should be prepared.

EQUIPMENT:

None.

ARTICULATION RESEARCH PROJECT

Instructional Objectives Guide August 1977

PROGRAM: Accounting (DCC T-016), Business Administration (DCC T-018), Executive Secretary (DCC T-030), Stenographer (DPI).

COURSE: Business Mathematics (Block 0.2)

COURSE DESCRIPTION: Department of Community Colleges No. BUS 109
Department of Public Instruction No. 6910

INSTRUCTIONAL HOURS: High Schools: 180 hours
Community Colleges/Technical Institutes: 55 hours

INSTRUCTIONAL OBJECTIVES:

1. To review for or develop in the learner the skills required to perform the basic mathematical processes applicable to computational situations encountered daily by consumers and business workers.

2. To provide specific occupationally directed mathematical skills to the learner needed in dealing with topics such as how to calculate or compute interest, discounts, investments, payrolls, insurance, taxes, percentages, commissions, cash transactions, and credit.

JOB QUALIFICATION:

This is a foundation type course of instruction which serves to provide a necessary basic capability to help the learner to function adequately in a business environment, but does not provide a specific job qualification.

PREREQUISITES:

High Schools: None.
Community Colleges/Technical Institutes: None.

PERFORMANCE EVALUATION:

The course evaluation of learner performance will be performed by the individual teacher. The ability of the learner to apply the skills acquired will be integrated into the evaluation of primary business course subjects requiring mathematical computational skills.

EQUIPMENT:

No special equipment requirements other than normally available in the average classroom.

ARTICULATION RESEARCH PROJECT

INSTRUCTIONAL GUIDE

PROGRAM(S): SECRETARIAL SCIENCE (EXECUTIVE SECRETARY-DCC T-030), ACCOUNTING (DCC T-016) AND BUSINESS ADMINISTRATION (DCC T-018)

COURSE: PERSONAL DEVELOPMENT (BLOCK 1.0)

COURSE DESCRIPTION: There is no existing course in this subject area established by the Department of Public Instruction, but is taught as a unit in office occupations. Occupational advisors recommend strongly that the instructional objectives be covered. Selected instructional objectives should be covered during initial class activity with others by integration, at recurrent intervals, with other instruction on a continuing basis.

INSTRUCTIONAL HOURS: 20-40 (Suggested instructional time for each instructional objective is an estimate of contact hours required to provide job qualification task performance for the average student. It is a planning figure only. Block instructional hours include evaluation time.)

INSTRUCTIONAL OBJECTIVES:

1. To practice good body care.
2. To maintain a neat, well-groomed appearance.
3. To dress appropriately.
4. To display proper attitude towards work.
5. To practice good business ethics.
6. To practice telephone courtesy.
7. To display physical poise.
8. To meet public tactfully.
9. To practice appropriate etiquette.
10. To develop proper attitude towards honesty and reliability.

JOB QUALIFICATION: None.

PREREQUISITE: None.

PERFORMANCE EVALUATION: By performance testing, see test items attached.

EQUIPMENT: See equipment list attached.

ARTICULATION RESEARCH PROJECT
OCCUPATIONAL TASKS AND INSTRUCTIONAL REQUIREMENTS

Accounting - Business Administration - Secretarial Science

BLOCK OR DIVISION NUMBER: 1.0 **TITLE:** Personal Development

TASK NUMBER: 1.01 **TITLE:** Use Proper Techniques for Good Body Care.

INSTRUCTIONAL OBJECTIVE - 1.01: How to Perform Good Body Care.

SKILLS: (Process Objectives)

How To:

1.011 - Keep physically clean.
1.012 - Care for nails.
1.013 - Care for hair.
1.014 - Select a proper diet.
1.015 - Maintain good physical fitness.

RELATED TECHNICAL INFORMATION:

- Know health and sanitation rules.
- Know steps for administering a manicure or pedicure.
- Know steps for proper hair care.
- Basic elements of a proper diet.
- Basic exercise.

Suggested Instructional Time: 1.01, 1-5 hours.

Required Performance Standards:

The learner must show evidence of being well-groomed in relationship to physical cleanliness, properly kept nails, well-kept hair. The student will show knowledge of good eating habits and requirements for good physical fitness. (Instructor's evaluation.)

BLOCK OR DIVISION NUMBER: 1.0 TITLE: Personal Development

TASK NUMBER: 1.02 TITLE: Dress appropriately and maintain neat, well-groomed appearance.

INSTRUCTIONAL OBJECTIVE - 1.02: How to dress appropriately and maintain neat, well-groomed appearance.

SKILLS: (Process Objectives)

How To:

1.021--Have clean clothing.
1.022--Select appropriate clothing.
1.023--Care for clothing.
1.024--Use appropriate accessories.

RELATED TECHNICAL INFORMATION:

- Know standards for acceptable dress.

Suggested Instructional Time: 1.02, 1-4 hours.

Required Performance Standards:

The learner must demonstrate the ability to maintain a neat, well-groomed appearance by having clean, appropriate, and well-kept clothing and accessories. (Instructor's evaluation.)

BLOCK OR DIVISION NUMBER: 1.0 **TITLE:** Personal Development (Continued)

TASK NUMBER: 1.03 **TITLE:** Display Proper Attitude Toward Work.

INSTRUCTIONAL OBJECTIVE - 1.03: How to Display Proper Attitude Toward Work.

SKILLS: (Process Objectives)

How To:

1.031 - Be conscientious.
1.032 - Be pleasant.
1.033 - Be tactful.
1.034 - Be cooperative.
1.035 - Accept constructive criticism.
1.036 - Fulfill job performance requirements.
1.037 - Accept responsibility.

RELATED TECHNICAL INFORMATION:

None.

SUGGESTED INSTRUCTIONAL TIME: 1.03, 1-3 hours.

REQUIRED PERFORMANCE STANDARDS:

The learner must display a proper attitude toward work. Learner must demonstrate the ability to be conscientious, pleasant, tactful and cooperative. The ability to accept constructive criticism gracefully, fulfill job performance requirements, be reliable, and accept responsibility are also essential.

BLOCK OR DIVISION NUMBER: 1.0 TITLE: Personal Development (Continued)

TASK NUMBER: 1.04 TITLE: Practice Good Business Ethics

INSTRUCTIONAL OBJECTIVE - 1.04: How to Practice Good Business Ethics.

SKILLS: (Process Objectives)

How To:

1.041 - Contribute to the practice of good business ethics.
1.042 - Maintain confidentiality.

RELATED TECHNICAL INFORMATION:

- Definition of business ethics.
- Value and need for honesty and loyalty in business.
- Need to observe legal limitations on business practices.
- Value of practice of good business ethics by employees.
- Honoring purchase and sales commitments.
- Fundamentals of warrantees, guarantees, copy rights and patent rights.
- Importance of contracts, personal and otherwise.

SUGGESTED INSTRUCTIONAL TIME: 1.04, 1-3 hours.

REQUIRED PERFORMANCE STANDARDS:

The learner can define good business ethics and loyalty to employer and state how they are applied by the employee.

BLOCK OR DIVISION NUMBER: 1.0 TITLE: Personal Development (Continued)

TASK NUMBER: 1.051 TITLE: Practice Telephone Courtesy.

INSTRUCTIONAL OBJECTIVE - 1.051: How to practice telephone courtesy.

SKILLS: (Process Objectives)

How To:

1.0511 - Use proper tone of voice.
1.0512 - Handle callers of all kinds.
1.0513 - Be tactful.
1.0514 - Handle incoming calls.
1.0515 - Record messages appropriately.

RELATED TECHNICAL INFORMATION:

- Rules of etiquette.
- Steps in handling incoming calls.

SUGGESTED INSTRUCTIONAL TIME: 1.051, 3-5 hours.

REQUIRED PERFORMANCE STANDARDS:

The learner must demonstrate his ability to practice telephone courtesy to instructor satisfaction.

BLOCK OR DIVISION NUMBER: 1.0 TITLE: Personal Development (Continued)

TASK NUMBER: 1.052 TITLE: Display Physical Poise.

INSTRUCTIONAL OBJECTIVE - 1.052: How to Display Physical Poise.

SKILLS: (Process Objectives)

How To:

1.0521 - Have proper posture.
1.0522 - Walk.
1.0523 - Sit.
1.0524 - Enter or leave a room.
1.0525 - Enter or leave a car.

RELATED TECHNICAL INFORMATION:

- Rules for entering and leaving a car.
- Rules for entering and leaving a room.
- Basic stance positions.

SUGGESTED INSTRUCTIONAL TIME: 1.052 1-2 hours.

REQUIRED PERFORMANCE STANDARDS:

The learner must display physical poise to instructor satisfaction.

BLOCK OR DIVISION NUMBER: 1.0 TITLE: Personal Development (Continued)

TASK NUMBER: 1.053 TITLE: Meet Public Tactfully.

INSTRUCTIONAL OBJECTIVE - 1.053: How to Meet Public Tactfully.

SKILLS: (Process Objectives)

How To:

1.0531 - Make introductions and to greet people.
1.0532 - Make intelligent conversation.
1.0533 - Be a good listener.
1.0534 - Handle awkward situations.
1.0535 - Act as host or hostess for employer.
1.0536 - Be a "peace maker".
1.0537 - Get along with others.

RELATED TECHNICAL INFORMATION:

- Steps to making an introduction.

SUGGESTED INSTRUCTIONAL TIME: 1.053, 4-6 hours.

REQUIRED PERFORMANCE STANDARDS:

The learner must demonstrate his ability to meet the public tactfully, be cooperative, and get along with others during classroom situations.

BLOCK OR DIVISION NUMBER: 1.0 TITLE: Personal Development (Continued)

TASK NUMBER: 1.06 TITLE: Practice Appropriate Etiquette In Public.

INSTRUCTIONAL OBJECTIVE - 1.06: How To Practice Appropriate Etiquette in Public.

SKILLS: (Process Objectives)

How To:

1.061 - Use Good Table Manners.
1.062 - Practice Good Etiquette.
1.063 - Determine accepted social behavior in business offices.

RELATED TECHNICAL INFORMATION:

- Need for etiquette and acceptable social behavior in business office situations.
- Know etiquette rules.
- Accepted Social behavior in business offices.

SUGGESTED INSTRUCTIONAL TIME: 1.06, 3-5 hours.

REQUIRED PERFORMANCE STANDARDS:

The learner must habitually demonstrate appropriate etiquette qualities in his interpersonal relationships in the classroom.

BLOCK OR DIVISION NUMBER: 1.0 **TITLE:** Personal Development (cont'd.)

TASK NUMBER: 1.07 **TITLE:** Demonstrate a Positive Attitude Toward Honesty.

INSTRUCTIONAL OBJECTIVE - 1.07: To Develop a Positive Attitude Toward Honesty.

SKILLS: (Process Objectives)

None.

RELATED TECHNICAL INFORMATION:

- Value of employee honesty to the individual and the employer.
- Responsibilities of employee to protect employer's property.
- Impact of employee dishonesty upon business and industry and the cost of consumer products and services.
- Current detection procedures and devices used to protect funds, property, goods and to ensure employee production.
- Penalties accruing to employee from apprehension for dishonest practices.
- Golden Rule.

SUGGESTED INSTRUCTIONAL TIME: 1.07, 1-3 hours.

REQUIRED PERFORMANCE STANDARDS:

The learner demonstrates familiarity with honesty considerations and practices honesty and respect for private and public property in the classroom.

TEST ITEMS

BLOCK OR DIVISION NUMBER: 1.0 TITLE: Personal Development

1.01 The student will:
a) Plan a proper day's menu for three meals including the four basic food groups. 90% accuracy.
b) Identify at least 10 standards that determine acceptable body cleanliness and physical fitness. 90% accuracy.

1.021 The student will dress appropriately for a day in the office according to acceptable standards.

1.03 The student will list 5 proper attitudes toward work.
Standards: 5 correct attitudes as commonly accepted.

1.051 Given a telephone and a message to cancel someone's important appointment, the student will place the call and tactfully relate the message.
Standards: Acceptable to instructor - consider how worded, courtesy tact, accuracy.

1.052 a) Given a chair, the student will demonstrate the proper way to sit and rise from the chair in front of an audience.
Standard: acceptable.

b) Given a simulated car, the student will demonstrate the proper way to enter and depart from the vehicle.
Standard: acceptable.

1.053 a) The student will demonstrate how to introduce a teenager to an elderly person, and a man to a woman.
Standard: Acceptable according to custom, with appropriate courtesy.

b) The student will list 3 aspects of how to be a good hostess or host.
Standard: 100% accuracy

c) The student is working at a complaint desk - Given a situation in which a dissatisfied customer burst into your office and starts raking you over the coals as if everything were your fault, what would your response be as an acceptable "peace maker," relative to tact, poise, understanding, firmness, and ability to correct the problem.
Standard: 85% accuracy.

1.06 a) The student will identify ten of the most common rules of modern etiquette that should be practiced in an office.
Standard: 80% accuracy.

b) The student will demonstrate five items of good table manners, given a chair, table, place setting, napkins, and serving dishes out of reach. (Use of silverware, napkin, elbows, asking for serving dishes, taking food from serving dish, etc.)
Standard: 100% accuracy based upon modern table etiquette.

1.07 Learner will list five reasons for employee honesty.
Standard: 100% validity for reasons stated.

1.04 The learner will define business ethics.
Standard: Approximates dictionary definition accurately.

EQUIPMENT

BLOCK OR DIVISION NUMBER: 1.0 TITLE: Personal Development

1. Mannequins with clothing that is appropriate and clothing that is not appropriate.
2. Tape recorder (1).
3. Telephone teaching unit (one for each student).
4. Film projector (1).
5. Overhead projector (1).
6. Film strip projector (1).
7. Equipment storage cabinet (1).

ARTICULATION RESEARCH PROJECT

INSTRUCTIONAL GUIDE

PROGRSM(S): SECRETARIAL SCIENCE (EXECUTIVE SECRETARY - DCC T-030), ACCOUNTING (DCC T-016), AND BUSINESS ADMINISTRATION (DCC T-018)

COURSE: TYPING (BASIC) (2.0)

COURSE DESCRIPTION: Department of Public Instruction: No. 6110 Typewriting I
Department of Community Colleges: Bus 102 and Bus 103, Typewriting I and II*

INSTRUCTIONAL HOURS: 180 Hours-High School; 110-165 Hours-CC/TI

INSTRUCTIONAL OBJECTIVES:

1. To operate typewriter correctly.
2. To develop touch typewriting competency.
3. To develop proper typing techniques applied in tabulation, manuscripts, correspondence, business forms, stencils, and duplicator masters.
4. To develop typewriting speed and accuracy sufficient to meet minimum Civil Service standards for lowest level office clerical job requirements. Minimum acceptable - 40 wpm, 5 minutes, 5 errors

JOB QUALIFICATIONS:

Those students who have successfully completed this course can perform basic typing tasks adequate for lowest level clerical duties. It is a foundation course.

PREREQUISITES:

None.

PERFORMANCE EVALUATIONS: By performance testing, based upon occupational standards. (Typographical errors when circled by learner count as corrected. Accuracy requirements are based upon job performance standards. 100 % performance) (See test items.)

EQUIPMENT: See equipment list.

*Note: Some institutions do not require a typing speed of 40 wpm until completion of BUS 104 in Basic Typewriting Block with 165 total instructional hours.

ARTICULATION RESEARCH PROJECT
OCCUPATIONAL TASKS AND INSTRUCTIONAL REQUIREMENTS

Accounting - Secretarial Science - Business Administration

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic)

TASK NUMBER: 2.01 TITLE: Operate Typewriter

INSTRUCTIONAL OBJECTIVE - 2.01: How to operate typewriter.

SKILLS: (Process Objectives)

How To:

2.011 - Use typewriters safely.
2.012 - Have good typing posture.
2.013 - Identify operative parts of machine.
2.014 - Type letter keys and set margins.
2.015 - Type figures and symbol keys.
2.016 - Have good typing techniques.
2.017 - Care for and clean typewriter.
2.018 - Correct errors using various methods.

RELATED TECHNICAL INFORMATION:

- Safety rules for typewriters.
- Typewriter parts identification, see manufacturer's instructions manual.
- Rules for good typing posture.
- Operator care of typewriter.

SUGGESTED INSTRUCTIONAL TIME: 2.01, 55-60 hours.

REQUIRED PERFORMANCE STANDARDS:

2.011 - Instructor's observation based upon manufacturer's instructions manual.
2.012 - same as 2.011.
2.013 - Test - 90% accuracy.
2.014 - Keyboard outline test - 95% accuracy.
2.015 - Same as 2.014.
2.016 - Instructor's observations based upon manufacturer's instructions manual.
2.017 - Same as 2.016.

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic) (Continued)

TASK NUMBER: 2.02 TITLE: Prepare file labels.

INSTRUCTIONAL OBJECTIVE - 2.02: How to type file labels.

SKILLS: (Process Objectives)

How To;

2.021 - Type various styles of labels.
2.022 - Insert into machine the most efficient way.
2.023 - Choose vertical placement of label information.
2.024 - Choose horizontal placement of information on label.

RELATED TECHNICAL INFORMATION:

- Styles of labels.

SUGGESTED INSTRUCTIONAL TIME: 2.02, 1-2 hours. (Introductory only.)

REQUIRED PERFORMANCE STANDARDS:

Instructor observation and 100% performance on problems.

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic) (Continued)

TASK NUMBER: 2.03 TITLE: Prepare Postal Cards.

INSTRUCTIONAL OBJECTIVE - 2.03: How to type postal cards.

SKILLS: (Process Objectives)

How To:

2.031 - Determine size of card.
2.032 - Count number of vertical lines on card.
2.033 - Count number of horizontal spaces on card.
2.034 - Decide center of card.
2.035 - Adjust machine for message side of card.
2.036 - Determine address placement and return address on card.
2.037 - Use zip code directory.

RELATED TECHNICAL INFORMATION:

- Description of forms.
- Steps for setting margins.

SUGGESTED INSTRUCTIONAL TIME: 2.03, 1-2 hours. (Introductory only.)

REQUIRED PERFORMAMCE STANDARDS:

100% performance on problems.

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic) (Continued)

TASK NUMBER: 2.04 TITLE: Prepare Copy From Simple Rough Draft Material With Proofreader's Marks.

INSTRUCTIONAL OBJECTIVE - 2.04: How to Prepare Copy From Simple Rough Draft Material With Proofreader's Marks.

SKILLS: (Process Objectives)

How To:

2.041 - Improve Techniques.
2.042 - Type from a rough draft copy.
2.043 - Improve grammar and punctuation skills.
2.044 - Interpret proofreader's marks.

RELATED TECHNICAL INFORMATION:

- Proofreader's marks.
- Letter placement.
- Word-division rules.
- Grammar guides.
- Letter format.

SUGGESTED INSTRUCTIONAL TIME: 2.04, 10 hours.

REQUIRED PERFORMANCE STANDARDS:

Produces mailable copy in acceptable time.

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic) (Continued)

TASK NUMBER: 2.05 TITLE: Prepare Envelopes and Labels for Mailing.

INSTRUCTIONAL OBJECTIVE - 2.05: How to Prepare Envelopes and Labels for Mailing.

SKILLS: (Process Objectives)

How To:

2.051 - Determine envelope size - both large and small.
2.052 - Determine number of horizontal spaces on envelope.
2.053 - Determine number of vertical lines on envelope.
2.054 - Determine correct placement for addresses (return and envelope).
2.055 - Use proper spacing in address.
2.056 - Place special notations (special delivery, airmail, etc.).
2.057 - Align type on labels.
2.058 - Use chain feeding labels.

RELATED TECHNICAL INFORMATION:

- Use of zip code directory.
- Description of forms.
- Steps for setting margins.
- Types and purpose of standard envelopes.

SUGGESTED INSTRUCTIONAL TIME: 2.04, 10-15 hours.

REQUIRED PERFORMANCE STANDARDS:

100% performance on problems.

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic) (Continued)

TASK NUMBER: 2.06 TITLE: Prepare Memorandum.

INSTRUCTIONAL OBJECTIVE - 2.06: How to Prepare Memorandum.

SKILLS:

How To:

2.061 - Set up memo on plain paper using correct margins and placement.
2.062 - Adjust machine to set up and type message on office memos using printed forms.
2.063 - Align type with printed headings on forms.

RELATED TECHNICAL INFORMATION:

- Memorandum formats.
- Typewriter parts identification.

SUGGESTED INSTRUCTIONAL TIME: 2.06, 15-20 hours.

REQUIRED PERFORMANCE STANDARDS:

Produces mailable copy in acceptable time.

BLOCK OR DIVISION NUMBER: 2.0 **TITLE:** Typewriting (Basic) (Continued)

TASK NUMBER: 2.07 **TITLE:** Prepare Letters (Business and Personal).

INSTRUCTIONAL OBJECTIVE - 2.07: How to Prepare Letters (Business and Personal).

SKILLS: (Process Objectives)

How To:

2.071 - Determine the difference between business and personal letters.
2.072 - Name the parts of a letter.
2.073 - Judge the length of the letter
2.074 - Set correct marginal adjustments for long and short letters.
2.075 - Type different letter styles.
2.076 - Use different forms of punctuation.
2.077 - Use correct spacing between different letter parts.
2.078 - Fold and insert letter for small, large, and window envelopes.
2.079 - Place special notations.
2.0710 - Set up letter on regular size paper, off-size paper, plain paper and letterhead paper.
2.0711 - Prepare a multi-page letter with enumerated items, tabulated reports, etc.

RELATED TECHNICAL INFORMATION:

- Business letter formats.
- Personal letter formats.
- Punctuation and grammar rules.
- Standard abbreviations.
- Types and purpose of more common typing paper varieties, (typewriter bond, 2nd sheets, executive bond, etc.).
- Typewriter parts identification.

SUGGESTED INSTRUCTIONAL TIME: 2.07, 33 hours.

REQUIRED PERFORMANCE STANDARDS:

Produces mailable copy in acceptable time.

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic) (Continued)

TASK NUMBER: 2.08 TITLE: Composing at Typewriter.

INSTRUCTIONAL OBJECTIVE - 2.08: How to Compose Simple Copy at Typewriter.

SKILLS: (Process Objectives)

How To:

2.081 - Apply language arts skills.
2.082 - Express organized thoughts and ideas.

RELATED TECHNICAL INFORMATION·

- Capitalization guides.
- Punctuation guides.
- Grammar Guides.
- Word-division rules.
- Letter placement.
- Letter formats.

SUGGESTED INSTRUCTIONAL TIME: 2.08, 5-10 hours.

REQUIRED PERFORMANCE STANDARDS:

Produces a mailable copy in acceptable time.

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic) (Continued)

TASK NUMBER: 2.09 TITLE: Make Carbon Copies.

INSTRUCTIONAL OBJECTIVE - 2.09: How to Make Carbon Copies.

SKILLS: (Process Objectives)

How To:

2.091 - Determine type of paper for carbon copies.
2.092 - Place carbon between sheets of paper.
2.093 - Insert into machine.
2.094 - Correct errors.
2.095 - Remove carbon from between copies.

RELATED TECHNICAL INFORMATION:

- Carbon paper types and characteristics.
- Multiple copy paper types and characteristics.

SUGGESTED INSTRUCTIONAL TIME: 2.09, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

Produces a mailable copy in acceptable time.

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic) (Continued)

TASK NUMBER: 2.10 TITLE: Perform Simple Tabulation.

INSTRUCTIONAL OBJECTIVE - 2.10: How to Perform Simple Tabulation.

SKILLS: (Process Objectives)

How To:

2.101 - How to operate tab keys.
2.102 - How to plan horizontal placement.
2.103 - How to plan vertical placement.

RELATED TECHNICAL INFORMATION:

- Purpose of Tabulation.
- Tabulation Formats.

SUGGESTED INSTRUCTIONAL TIME: 2.10, 20-25 hours.

REQUIRED PERFORMANCE STANDARDS:

Produces mailable copy based upon instructor eye judgment.

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic) (Continued)

TASK NUMBER: 2.11 TITLE: Prepare Outlines.

INSTRUCTIONAL OBJECTIVE - 2.11: How to Prepare Outlines.

SKILLS: (Process Objectives)

How To:

2.111 - Position on paper (vertically).
2.112 - Determine margins and tabulations.
2.113 - Determine spacing between items.
2.114 - Align numbers.

RELATED TECHNICAL INFORMATION:

- Outline formats.
- Typewriter parts identification.

SUGGESTED INSTRUCTIONAL TIME: 2.11, 2-3 hours.

REQUIRED PERFORMANCE STANDARDS:

Produces mailable copy based upon instructor eye judgment, in acceptable time.

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic) (Continued)

TASK NUMBER: 2.12 TITLE: Prepare Manuscripts.

INSTRUCTIONAL OBJECTIVE - 2.13: How to Prepare Manuscripts.

SKILLS: (Process Objectives)

How To:

2.121 - Set up margins.
2.122 - Plan and type footnotes.
2.123 - Type side headings.
2.124 - Plan and type cover page.
2.125 - Plan and type bibliography.

RELATED TECHNICAL INFORMATION:

- Standard manuscript formats.

SUGGESTED INSTRUCTIONAL TIME: 2.12, 15 hours.

REQUIRED PERFORMANCE STANDARDS:

Produces mailable copy in acceptable time.

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic) (Continued)

TASK NUMBER: 2.13 TITLE: Prepare Fill-In Forms.

INSTRUCTIONAL OBJECTIVE - 2.13: How to Prepare Fill-In Forms.

SKILLS: (Process Objectives)

How To:

2.131 - Type on lined forms.
2.132 - Position machine to type on lined forms.
2.133 - Use variable line spacer and paper release lever.

RELATED TECHNICAL INFORMATION:

SUGGESTED INSTRUCTIONAL TIME: 2.13, 4-6 hours.

REQUIRED PERFORMANCE STANDARDS:

Produces a mailable copy based upon instructor eye judgment in acceptable time

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic) (Continued)

TASK NUMBER: 2.14 TITLE: Prepare Charts, Tables and Other Tabulated Reports.

INSTRUCTIONAL OBJECTIVE - 2.14: How to Prepare Charts, Tables and Other Tabulated Reports.

SKILLS: (Process Objectives)

How To:

2.141 - Plan columns and set up tab stops.
2.142 - Determine attractive placement.

RELATED TECHNICAL INFORMATION:

- Common types of graphs.

SUGGESTED INSTRUCTIONAL TIME: 2.14, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

Produces a mailable copy based upon instructor eye judgment in acceptable time.

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic) (Continued)

TASK NUMBER: 2.15 TITLE: Prepare Simple Agenda.

INSTRUCTIONAL OBJECTIVE: - 2.15: How to Prepare Simple Agenda.

SKILLS: (Process Objectives)

How To:

2.151 - Set margins and tab stops.
2.152 - Center headings.

RELATED TECHNICAL INFORMATION:

- Agenda formats.

SUGGESTED INSTRUCTIONAL TIME: 2.15, 3 hours.

REQUIRED PERFORMANCE STANDARDS:

Produces a mailable copy based upon instructor eye judgment in acceptable time.

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic) (Continued)

TASK NUMBER: 2.16 TITLE: Prepare Stencils and Duplicator Masters.

INSTRUCTIONAL OBJECTIVE - 2.16: How to Prepare Stencils and Duplicator Masters.

SKILLS: (Process Objectives)

How To:

2.161 - Set the ribbon.
2.162 - Prepare stencil or master.
2.163 - Clean keys.
2.164 - Make corrections.

RELATED TECHNICAL INFORMATION:

- Types and characteristics of duplicator masters and stencils.
- Handling cautions.
- Storage requirements and shelf life of various reproduction masters and paper.

SUGGESTED INSTRUCTIONAL TIME: 2.16, 5 hours. (This is intended as the basic or introductory phase only for this task.)

REQUIRED PERFORMANCE STANDARDS:

Written Test - 95% accuracy.
100% performance on simple problems.

BLOCK OR DIVISION NUMBER: 2.0 TITLE: Typewriting (Basic)

2.01 Given a typewriter, paper, and 100-word paragraph composed of letters, figures, and symbols, type one readable copy using good typing posture and techniques.
Standard: One copy with no more than 5 errors.

2.02 Given a roll of gummed labels, typewriter, eraser and list of ten names, prepare labels for the ten names.
Standard: 100% accuracy.

2.03 Prepare a postal card, given a typewriter, a postal card, an eraser, the addresses (both return and receiver address) and the message to be typed with correct placement.
Standard: Mailable copy.

2.04 Given a simple 200 word rough draft page of copy with proofreader's marks, typewriter, and necessary material, prepare a final draft.
Standard: Mailable copy in 25 minutes.

2.05 Student will demonstrate his ability to correctly address 10 envelopes and 10 labels, given the typewriter, eraser, envelopes, and gummed labels and addresses of sender and receiver.
Standard: 95% neatness and 100% accuracy in 20 minutes.

2.06 Given a 200-word printed memo form, typewriter, eraser, and message, name and department of sender and receiver, prepare an interoffice memo.
Standard: Prepared in 15 minutes - 95% neatness, produces mailable copy.

2.07 Set up and type in an acceptable letter style, a properly positioned 200 word business letter, given a typewriter, an eraser, letterhead paper, and information for an acknowledgement letter (receipt of order).
Standard: 95% neatness in 20 minutes; produces mailable copy.

2.08 Given basic information for a simple business letter and necessary equipment, compose an appropriate letter of approximately 150 words.
Standard: Mailable copy in 30 minutes.

2.09 Prepare a letter with a carbon copy given the typewriter, letter, carbon paper, onionskin paper, copy paper, letterhead, eraser, and erasing shield.
Standard: 100% accuracy and 90% neatness in 40 minutes, mailable copy.

2.10 Given a typewriter, paper, eraser, and a page of tabulated information, prepare a copy of the information in tabulated form.
Standard: 90% accuracy and mailable copy in one hour.

2.11 Given a typewriter, copy paper, eraser, rough copy of an outline, prepare a properly positioned copy of an outline.
Standard: 100% accuracy and mailable copy in 30 minutes.

2.12 Given a typewriter, required material, a page of rough draft manuscript with proofreader's marks, prepare in final form.
Standard: Mailable copy in 40 minutes.

2.13 Given a typewriter, eraser, a printed supply requisition form, and information on supplies desired, prepare an acceptable supply requisition.
Standard: 100% accuracy and 90% neatness in 30 minutes.

2.14 Given a typewriter, paper, eraser, information for technical report including tabulated report, prepare an acceptable copy of tabulated table.
Standard: 90% accuracy and neatness in one hour.

2.15 Given a list of agenda items, typewriter, master unit, correction blades, prepare an acceptable copy of an agenda.
Standard: 100% accuracy, master unit prints clear, readable copy.

2.16 Given a rough copy of an itinerary, stencil, burnisher, correction fluid, typewriter, the student will prepare one acceptable stencil.
Standard: 100% accuracy in one hour, stencil prints clear, readable copy.

EQUIPMENT LIST

BLOCK OR DIVISION: 2.0 TITLE: Typing (Beginning)

5.0 TITLE: Typing (Advanced)

1. Typewriters (one per student) (75% manual & 25% electric)
2. Overhead projector (1)
3. Record player (1)
4. Demonstration stand (1)
5. Automatic typewriter (1) [Advanced Only]
6. Interval timer and stopwatch (1)

ARTICULATION RESEARCH PROJECT

INSTRUCTIONAL GUIDE

PROGRAM(S): SECRETARIAL SCIENCE (EXECUTIVE SECRETARY - DCC T-030), ACCOUNTING (DCC T-016), AND BUSINESS ADMINISTRATION (DCC T-018)

COURSE: Records Management (Block 2.5)

COURSE DESCRIPTION: Department of Public Instruction: Included in 6410 and 6431

Department of Community College: Bus 112, Records Management

INSTRUCTIONAL HOURS: High Schools - 35 to 45 Hours; CC/T - 33 Hours.

INSTRUCTIONAL OBJECTIVES:

1. To provide learner with broad background training in basic filing principles and records management systems.
2. To file accurately, quickly, and systematically.

JOB QUALIFICATIONS:

Those students who have successfully completed this course and are certified as occupationally qualified, can perform basic records management tasks as a file clerk. Job qualification to be determined by performance testing at end of course or program.

PREREQUISITES: Basic Typing (Block 2.0)

PERFORMANCE EVALUATION: By performance testing (see attached test items). Learner is expected to meet initial entry level occupational performance standards.

EQUIPMENT: See Equipment List.

Note: Current Civil Service and D.O.T. job descriptions for business office clerical, stenographic and secretarial jobs establish a requirement for records management (filing) job skill qualification.

ARTICULATION RESEARCH PROJECT
OCCUPATIONAL TASKS AND INSTRUCTIONAL REQUIREMENTS

Accounting - Business Administration - Secretarial Science

BLOCK OR DIVISION NUMBER: 2.5 TITLE: Records Management

TASK NUMBER: 2.51 TITLE: Prepare Folders and Other Filing Material for Use.

INSTRUCTIONAL OBJECTIVE - 2.51: How to Prepare Folders and Other Filing Material for Use.

SKILLS: (Process Objectives)

2.511 - How to type labels.
2.512 - How to use different types of folders.
2.513 - How to prepare tabs.
2.514 - How to prepare captions.

RELATED TECHNICAL INFORMATION:

- Types of folders.
- Types of labels.

REQUIRED INSTRUCTIONAL TIME: 2.51, 1 hours.

RELATED GENERAL INFORMATION:

As the result of a nation wide study, it was determined that the average secretary spends more of the working day typing, communicating & filing than any other tasks.

VOCATIONAL GUIDANCE:

The individual who has occupational competency in records management, and can also perform basic typing tasks, is job qualified as a file clerk.

REQUIRED PERFORMANCE STANDARDS:

- Demonstrates ability to identify and use different types of file folders, labels, and tabs correctly and to prepare captions with 100% accuracy.

BLOCK OR DIVISION NUMBER: 2.5 TITLE: Records Management

TASK NUMBER: 2.52 TITLE: Sort and Classify Material.

INSTRUCTIONAL OBJECTIVE - 2.52: How to Sort and Classify Material.

SKILLS: (Process Objectives)

2.521 - How to classify records management topics of material.
2.522 - How to sort material into alphabetic groups.
2.523 - How to handle classified or sensitive material, to include destruction of such material when required.

RELATED TECHNICAL INFORMATION:

- Know records management rules.
- Definition of classified or sensitive material.
- Rules and laws pertaining to right of privacy and the release or handling of classified, sensitive, or personal information.

SUGGESTED INSTRUCTIONAL TIME: 2.52, 20-30 hours.

REQUIRED PERFORMANCE STANDARDS:

- Demonstrates working knowledge of filing rules and the ability to apply same in classifying and sorting items to be filed, to include handling of classified material, according to either filing rule, with 90% accuracy.

BLOCK OR DIVISION NUMBER: 2.5 TITLE: Records Management

TASK NUMBER: 2.53 TITLE: Use Records Management Equipment.

INSTRUCTIONAL OBJECTIVE - 2.53: How to Use Records Management Equipment.

SKILLS: (Process Objectives)

2.531 - How to use different types of records management equipment.
2.532 - How to identify advantages and disadvantages of each type of records management equipment.
2.533 - How to choose types for different purposes.

RELATED TECHNICAL INFORMATION:

- Know the different types of equipment.

SUGGESTED INSTRUCTIONAL TIME: 2.53, 2 hours.

REQUIRED PERFORMANCE STANDARDS:

- Demonstrates ability to identify and properly use different types of filing equipment.

BLOCK OR DIVISION NUMBER: 2.5 TITLE: Records Management (Continued)

TASK NUMBER: 2.54 TITLE: Requisition Office Supplies.

INSTRUCTIONAL OBJECTIVE - 2.54: How to Requisition Office Supplies.

SKILLS: (Process Objectives)

2.541 - How to set up requisition methods.
2.542 - How to follow requisition methods.

RELATED TECHNICAL INFORMATION:

- Know requisition methods.

SUGGESTED INSTRUCTIONAL TIME: 2.54, 2 hours.

REQUIRED PERFORMANCE STANDARDS:

- Demonstrates ability to identify required records management supplies and to use supply catalogs to fill out supply requisitions, with 100% accuracy.
- Demonstrates ability to use standard office supply requisition forms to requisition filing supplies, with 100% accuracy.

BLOCK OR DIVISION NUMBER: 2.5 TITLE: Records Management (Continued)

TASK NUMBER: 2.55 TITLE: Charge Out Files.

INSTRUCTIONAL OBJECTIVE - 2.55: How to Charge Out Files.

SKILLS: (Process Objectives)

2.551 - How to set up charge-out systems.
2.552 - How to use charge-out systems.
2.553 - How to keep current records of charge-outs.
2.554 - How to follow up charge-outs.

RELATED TECHNICAL INFORMATION:

- Charge-out systems.
- Follow-up systems.
- Classified and sensitive items charge-out systems.

SUGGESTED INSTRUCTIONAL TIME: 2.55, 2-5 hours.

REQUIRED PERFORMANCE STANDARDS:

- Demonstrates ability to setup and apply records management charge-out systems, maintain records of charge-outs, to include classified material or sensitive items, and to follow-up charge-out files with 100% accuracy.

BLOCK OR DIVISION NUMBER: 2.5 TITLE: Records Management (cont'd.)

TASK NUMBER: 2.56 TITLE: Transfer Inactive Records.

INSTRUCTIONAL OBJECTIVE - 2.56: How to Transfer Inactive Records.

SKILLS: (Process Objectives)

2.561 - How to set up transfer and retention policies.
2.562 - How to transfer inactive materials.
2.563 - How to store inactive materials.
2.564 - How to identify vital records.
2.565 - How to store vital records.
2.566 - How to identify materials to be discarded instead of transferred to inactive files.

RELATED TECHNICAL INFORMATION:

- Know transfer and retention policies.
- Know legal requirements for retention.

SUGGESTED INSTRUCTIONAL TIME: 2.56, 2-5 hours.

REQUIRED PERFORMANCE STANDARDS:

- Demonstrates ability to apply a file transfer and retention policy.
- Demonstrates ability to store in-active and vital records based upon established policies and procedures.
- Demonstrates knowledge of standard procedures for identification of filed material to be retained or discarded; with 90% accuracy.
- Demonstrates knowledge of special handling requirements for the destruction of classified material.

Accounting, Business Administration, Secretarial Science

TESTING AND STANDARDS

BLOCK OR DIVISION NUMBER: 2.5 TITLE: Records Management

2.51 Demonstrate how to prepare 5 file folders, given the captions to be used, the file folders, labels and a typewriter.
Requirement: 100% accuracy

2.52 Classify and alphabetically sort items according to one set (Set One or Set Two) of acceptable rules of records management.
Requirement: 95% accuracy

2.53 Given 15 varied items to be filed, tell what type of filing equipment would be most suitable for each item and why.
Requirement: 85% accuracy

2.54 & 2.55 Given a box of previously filed material and a charge-out and follow-up sheet, request any three items, charge them out, have two items returned, and request a follow-up of item three.
Requirement: 100% accuracy

2.56 Given 10 papers predated and prefiled, decide what papers should be transferred to inactive files or disposed of now. Assume that this firm keeps all filed material active for two years and all vital records active indefinitely.
Requirement: 90% accuracy

EQUIPMENT

BLOCK OR DIVISION NUMBER: 2.5 TITLE: Records Management

1. File box (one for each student).
2. Overhead projector.

ARTICULATION RESEARCH PROJECT

INSTRUCTIONAL GUIDE

PROGRAM(S): SECRETARIAL SCIENCE (EXECUTIVE SECRETARY - DCC T-030), ACCOUNTING (DCC T-016), AND BUSINESS ADMINISTRATION (DCC T-018)

COURSE: BUSINESS MACHINES (CALCULATING) (Block 3.0)

COURSE DESCRIPTION: Department of Public Instruction: No. 6420 (Included in 6410 and 6431)

Department of Community Colleges: BUS 211 Office Machines I

INSTRUCTIONAL HOURS: High Schools - 30 to 45 Hours; CC/TI 30 - 55 hours.

INSTRUCTIONAL OBJECTIVES:

To train in techniques, processes, operation and application of adding and calculating machines, with emphasis upon learning the touch system for ten-key machines.

JOB QUALIFICATIONS:

Those students who have successfully completed this course and certified as occupationally qualified, can perform basic machine tasks on business machines of this type.

PREREQUISITES: None.

PERFORMANCE EVALUATION: By performance testing (see attached test items), based upon occupational standards.

EQUIPMENT: See equipment list attached.

ARTICULATION RESEARCH PROJECT
OCCUPATIONAL TASKS AND INSTRUCTIONAL REQUIREMENTS

Accounting - Business Administration - Secretarial Science

BLOCK OR DIVISION NUMBER: 3.0 TITLE: Business Machines [Calculating]

TASK NUMBER: 3.01 TITLE: Use Printing and/or Non-Printing Adding Machines and Calculators to Perform Mathematical Operations On:

Orders
Invoices
Inventory
Sales
Bills
Miscellaneous Accounts

INSTRUCTIONAL OBJECTIVE - 3.01: How to Use Printing and/or Non-Printing Adding Machines and Calculators.

SKILLS: (Process Objectives)

3.011 - How to identify machine basic parts.
3.012 - How to use touch system.
3.013 - How to perform basic mathematical functions on machine.
3.014 - How to check tape against figures on forms.

RELATED TECHNICAL INFORMATION:

- Know types of business forms.
- Know machine parts.

Required Instructional Time: 3.01, 30 hours.

Required Performance Standards:

- Can identify primary machine components and state the purpose of each with 100% accuracy.
- Can list the calculating capabilities of the machine(s) and perform an operation accurately using each.
- Uses correct fingers for touch system in operating machine.
- Employs proper techniques in machine use.
- Completes assigned calculating tasks using the machine in reasonable time limit.
- Checks work at completion of an operation.
- Achieves 100% calculating accuracy by end of course.

Accounting - Business Administration - Secretarial Science

TEST ITEMS

BLOCK OR DIVISION NUMBER: 3.0 TITLE: Business Machines [Calculating]

3.01 Given one or more calculating type business machines and a series of 20 simple problems common to business offices which require the following mathematical actions: addition, subtraction, multiplication, division, fractions, decimals, percentages; the student will demonstrate his ability to perform the necessary functions accurately.
Standard: 90% accuracy.

EQUIPMENT

BLOCK OR DIVISION NUMBER: 3.0 TITLE: Business Machines [Calculating]

1. Adding machines and calculators (ten-key) [One to each two students]
   These machines should be both printing and non-printing.

BLOCK OR DIVISION NUMBER: 4.0 TITLE: Business Machines [Reproduction and Projection] (cont'd.)

TASK NUMBER: 4.07 TITLE: Operate 35mm Slide Projector.

INSTRUCTIONAL OBJECTIVE - 4.07: How to Operate 35mm Slide Projector.

SKILLS: (Process Objectives)

How To:

4.071 - Insert slide in slide carrier.
4.072 - Center and focus frame.
4.073 - Operate machine.
4.074 - Change projection bulb.
4.075 - Prepare machine for storage.

RELATED TECHNICAL INFORMATION:

- Primary parts of machine.
- Steps for operation.
- Materials needed.
- Operator care and maintenance requirements.

SUGGESTED INSTRUCTIONAL TIME: 4.07 1 hours.

REQUIRED PERFORMANCE STANDARDS:

- Demonstrates abilitv to prepare projector for operation according to manufacturer's specifications.
- Can insert slides correctly in slide carrier or loading tray and operate machine to obtain a sharp, clear image on projection surface.
- Can change projector bulb.
- Demonstrates correct operator maintenance procedures, to include preparation for storage.

BLOCK OR DIVISION NUMBER: 4.0 TITLE: Business Machines [Reproduction and Projection] (cont'd.)

TASK NUMBER: 4.08 TITLE: Operate Motion Picture Projector.

INSTRUCTIONAL OBJECTIVE - 4.08: How to Operate Motion Picture Projector.

SKILLS: (Process Objectives)

How To;

4.081 - Put reel of film on machine.
4.082 - Thread projector.
4.083 - Operate projector.
4.084 - Focus projector.
4.085 - Change light bulb.
4.086 - Rewind film.
4.087 - Repair broken film.
4.088 - Store projector.

RELATED TECHNICAL INFORMATION:

- Parts of machine.
- Steps for operation.
- Materials needed.
- Operator care and maintenance requirements.

SUGGESTED INSTRUCTIONAL TIME: 4.08 1 hours. (Introductory Only)

REQUIRED PERFORMANCE STANDARDS

- Demonstrates ability to prepare projector for operation to include placing reel properly in machine.
- Demonstrates ability to operate machine and obtain a clear, sharp image with minimum delay.
- Demonstrates ability to repair broken film correctly, with no lost motion.
- Demonstrates ability to rewind projected film for subsequent use.
- Demonstrates ability to perform operator maintenance to include changing projection bulb and to prepare machine for storage according to manufacturer's instructions.

BLOCK OR DIVISION NUMBER: 4.0 TITLE: Business Machines [Reproduction and Projection] (cont'd.)

TASK NUMBER: 4.09 TITLE: Operate Spirit Duplicator.

INSTRUCTIONAL OBJECTIVE - 4.09 How to Operate Spirit Duplicator.

SKILLS: (Process Objectives)

How To:

4.091 - Turn on ink pressure and impression roller.
4.092 - Turn fluid tank.
4.093 - Load copy paper.
4.094 - Attach master to cylinder.
4.095 - Raise or lower master.
4.096 - Set counter.
4.097 - Operate machine to include reducing a feed choke.
4.098 - Run test copies.
4.099 - Prepare machine for idle period.

RELATED TECHNICAL INFORMATION:

- Parts of machine.
- Steps for operation.
- Materials needed.
- Operator care and maintenance requirements.

SUGGESTED INSTRUCTIONAL TIME: 4.09 3 hours.

REQUIRED PERFORMANCE STANDARDS:

- Prepares machine for operation to include adding duplicator fluid and loading copy paper according to manufacturer's instructions.
- Attaches master to cylinder and adjusts to obtain correct margins with minimum trial runs, then sets counter, correctly.
- Operates machine according to manufacturer's instructions and demonstrates ability to reduce feed chokes.
- Produces clear, legible, neat copy, with desired margins.
- Demonstrates ability to prepare machine for idle period.
- Observes required safety precautions.

BLOCK OR DIVISION NUMBER: 4.0 TITLE: Business Machines (Reproduction & Projection)

TASK NUMBER: 4.10 TITLE: Operate Mimeograph.

INSTRUCTIONAL OBJECTIVE - 4.10: How to Operate Mimeograph.

SKILLS: (Process Objectives)

How To:

4.101 - Release brake.
4.102 - Check ink supply.
4.103 - Replenish ink supply.
4.104 - Replace ink pad.
4.105 - Set counter.
4.106 - Attach stencil.
4.107 - Load paper.
4.108 - Run test copy.
4.109 - Attach protective cover and prepare machine for idle period.
4.110 - Store used stencil.
4.111 - Raise or lower copy.

RELATED TECHNICAL INFORMATION:

- Names of primary parts.
- Type of paper used.
- Materials required.
- Types of ink.
- Operator care and maintenance requirements.
- Electric stencil maker.

SUGGESTED INSTRUCTIONAL TIME: 4.10, 6 hours.

REQUIRED PERFORMANCE STANDARDS:

- Demonstrates ability to prepare machine for operation, to include loading paper and replenishing ink supply, according to manufacturer's instructions.
- Demonstrates ability to perform necessary operator maintenance according to to manufacturer's instructions.
- Demonstrates ability to set desired margins, run test copy with minimum waste, and set counter.
- Produces neat, clear, evenly printed copy, with proper position on paper.
- Observes required safety precautions.
- Demonstrates ability to reduce feed chokes correctly, with minimum lost motion.
- Prepares machine for idle period and stencils for storage according to manufacturer's instructions.

BLOCK OR DIVISION NUMBER: 4.0 TITLE: Business Machines [Reproduction and Projection] (cont'd.)

TASK NUMBER: 4.11 TITLE: Operate Offset Press.

INSTRUCTIONAL OBJECTIVE - 4.11: How to Operate Offset Press.

SKILLS: (Process Objectives)
How To:
4.111 - Mount master on cylinder.
4.112 - Prepare master
4.113 - Prepare machine for copying, to include
4.114 - Place copy paper in machine.
4.115 - Make contact.
4.116 - Make test copy.
4.117 - Clean machine.
4.118 - Prepare machine for idle period.
4.119 - Make offset plates.

RELATED TECHNICAL INFORMATION:

- Parts of machine.
- Steps for operation.
- Materials needed.
- Operator care and maintenance requirements.
- Safety rules.

SUGGESTED INSTRUCTIONAL TIME: 4.11, 1-10 hours. (Introductory Only for Secretarial Students.)

Required Performance Standards:
(For Job Qualification.)

- Demonstrates ability to prepare machine for operation, to include adding ink, loading paper, mounting master on cylinder and to prepare master for copying, according to manufacturer's instructions.
- Demonstrates ability to adjust machine for proper margins, make contact and run test copies with least waste copies and set counter.
- Demonstrates ability to produce clear, evenly inked, neat, properly positioned copies.
- Demonstrates ability to perform required operator maintenance and to reduce chokes according to manufacturer's instructions.
- Observes required safety precautions.
- Demonstrates ability to prepare machine for idle period according to manufacturer's instructions.

TEST ITEMS

BLOCK OR DIVISION NUMBER: 4.0 TITLE: Business Machines (Reproduction & Projection).

4.01 Given material for a 5-page booklet and a collator (10 booklets), the student will use the collator to assemble the pages.
Standard: Success in assembling the pages in proper sequence - 100%.

4.02 Given unfolded pamphlets and a folding machine, the student will set the machine so that the pamphlets will have three folds and complete folding process.
Standard: Success in folding pamphlets as directed - 100%.

4.03 Given a packet of paper and a binding machine, the student will bind paper into a finished booklet by using the automatic binder.
Standard: Success in binding all pages into finished booklet, neatly, with edges properly aligned.

4.04 Given an addressed package and letter, postage meter and scales, and postal rate catalog, the student will determine correct postage for letter and package. Put correct postage on letter and package.
Standard: Success in putting correct postage on letter and package - 100%.

4.05 Given copier, master unit, transparency sheet, piece of material to be copied and copy paper, the student will produce a transparency.
Standard: Success in producing a master properly exposed and centered.

4.06 Given a transparency, projector, and screen, the student will focus and center transparency image on the screen.
Standard: Success in centering a clear and sharp transparency image on screen.

4.07 Given a slide projector and 5 loose slides, the student will insert, focus, and project image on projection surfact. Prepare machine for storage.
Standard: Success in assignment (image properly centered, focused, right side up, and not reversed). (Machine cool and all items correctly placed in carrying case.)

4.08 Given a reel of film, projector with no projection light, screen, and good bulb, the student will show the film. Rewind and prepare for storage.
Standard: Success in assignment (sets up equipment each step correctly, threads film properly, diagnoses problem and takes proper corrective action; focuses clear picture, adjusts sound volume correctly; reqinds film properly and secures end, places in can. Places all items correctly in carrying case and prepares projector for traveling.)

4.09 Given a prepared master, duplicator, duplicator fluid, 15 sheets of copy paper, and empty fluid tank, the student will run ten clear copies properly positioned on paper.
Standard: Success with assignment (ten clear copies properly positioned).

4.10 Given prepared stencil, mimeograph machine, ink, and 10 sheets of copy paper, the student will run five clear copies properly positioned on paper.
Standard: Success with assignment (five clear copies properly positioned on paper).

4.11 Given prepared master, offset press, 15 she ts of copy paper, the student will produce ten good copies correctly positioned on the paper. Demonstrate steps in cleaning machine.
Standard: Success with assignments (ten good copies, evenly imprinted, correctly positioned on the paper).

EQUIPMENT

BLOCK OR DIVISION NUMBER: 4.0 TITLE: Business Machines [Reproduction and Projection]

1. Telephone teaching unit (one for each two students)
2. Collator (1)
3. Folding machine (1)
4. Binding machine (1)
5. Postage meter and scales (1)
6. Overhead projector (1)
7. Transcription macnine (one to each three students)
8. Copier (1)
9. Slide projector (1)
10. Movie projector (1)
11. Spirit duplicator (1)
12. Mimeograph (1)
13. Automatic typewriter (1)
14. Offset press (1)
15. Storage Cabinets (2)

ARTICULATION RESEARCH PROJECT
INSTRUCTIONAL GUIDE

PROGRAM: Secretarial Science (Executive Secretary, DDD T-030)/Stenographer

COURSE: Typewriting (Advanced) (Block 5.0)

COURSE DESCRIPTION: Department of Public Instruction: Typewriting II-6112, DCC BUS 104*, Typewriting III; BUS 205, Advanced Typewriting IV; and BUS 258, Advanced Typewriting V.

INSTRUCTIONAL HOURS: 180 Hours, High Schools; 165 Hours CC/TI.

INSTRUCTIONAL OBJECTIVES:

1. To emphasize production typing problems and speed building. CC/TI objective to reach a minimum of 60 wpm for 5 minutes with a maximum of 5 errors, high school to reach a minimum of 50 wpm for 5 minutes with a maximum of 5 errors.**

2. To develop techniques needed in planning, composing and typing projects that closely approximate the work appropriate to the field of study. These projects projects include review of letter forms, methods of duplication, statistical tabulation, and the typing of reports, manuscripts and legal documents.

JOB QUALIFICATIONS:

The learner who successfully completes this instruction plus Personal Development, Records Management, and Business Machines-Reproduction (Blocks 1.0, 2.5, and 4.0). is qualified as a clerk-typist.

PREREQUISITES: Basic Typewriting

PERFORMANCE EVALUATION: By performance testing, (see test items) based upon occupational standards.

EQUIPMENT: See equipment list attached.

* Note: Where BUS 104 is taught as basic typewriting, 40 wpm.

** Note: Acceptable typewriting speeds DCC:
*BUS 104 (Intermediate) - 50 wpm - 5 minutes - 5 errors.
BUS 205 (Advanced) - 55 wpm - 5 minutes - 5 errors.
BUS 258 (Production & Speed Building) 60 wpm - 5 minutes - 5 errors.

ARTICULATION RESEARCH PROJECT
INSTRUCTIONAL GUIDE

BLOCK OR DIVISION NUMBER: 5.0 TITLE: Typewriting (Advanced)

Note: Instructional objectives for the following tasks were covered as indicated in Block 2.0 Typewriting (Basic).

5.01 - All
5.02 - All
5.031- All
5.032- All
5.04 - 15-20 hours of 25-32 hours
5.05 - 33 hours of 77 to 90 hours
5.06 - All
5.07 - All
5.08 - None
5.09 - None
5.10 - 3 hours (agenda only) of 6-8 hours
5.11 - 15 hours of 35 to 40 hours
5.12 - 10 hours of 20 to 30 hours
5.13 - 5 of 15 hours
5.14 - 5 hours of 20 hours
5.15 - 4-6 of 14-21 hours
5.16 - 5 of 20-30 hours
5.17 - None
5.18 - None

Total: 165 to 180 hours

BLOCK OR DIVISION NUMBER: 5.0 TITLE: Typing (Advanced) (cont'd.)

TASK NUMBER: 5.04 TITLE: Prepare Memorandum.

INSTRUCTIONAL OBJECTIVE - 5.04: How to Prepare Memorandum.

SKILLS: (Process Objectives)

5.041 - How to set up memo on plain paper using correct margins and placement.
5.042 - How to adjust machine to set up and type message on office memos using printed forms.
5.043 - How to align type with printed headings on forms.
5.044 - How to compose at the typewriter.
5.045 - How to type from personal dictation.

RELATED TECHNICAL INFORMATION:

- Memorandum formats.
- Typewriter parts identification.
- All typing guides.
- All language Arts guides.

SUGGESTED INSTRUCTIONAL TIME: 5.04, 10-12 hours.

REQUIRED PERFORMANCE STANDARDS:

Mailable copy in accepted time limits.

BLOCK OR DIVISION NUMBER: 5.0 TITLE: Typewriting (Advanced)

TASK NUMBER: 5.05 TITLE: Prepare Letters (Business and Personal).

INSTRUCTIONAL OBJECTIVE - 5.05: How to Prepare Letters (Business and Personal.

SKILLS: (Process Objectives)

How To:

5.051 - Determine the difference between business and personal letters.
5.052 - Name the parts of a letter.
5.053 - Judge the length of the letter.
5.054 - Set correct marginal adjustments for long and short letters.
5.055 - Type different letter styles.
5.056 - Use different forms of punctuation.
5.057 - Use correct spacing between different letter parts.
5.058 - Fold and insert letter for small, large, or window envelopes.
5.059 - Place special notations.
5.0510 - Set up letter on regular size paper, off-size paper, plain paper and letterhead paper.
5.0511 - Prepare a multi-page letter with enumerated items, tabulated reports.
5.0512 - Prepare application letters, resumes, application forms.
5.0513 - Apply language arts and skills.
5.0514 - Express organized thoughts and ideas.

RELATED TECHNICAL INFORMATION:

- Business letter formats.
- Personal letter formats.
- Punctuation and grammar rules.
- Standard abbreviations.
- Types and purpose of more common typing paper varieties (typewriter bond, 2nd sheets, executive bond, etc.)
- Typewriter parts identification.

SUGGESTED INSTRUCTIONAL TIME: 5.05, 44-57 hours.

REQUIRED PERFORMANCE STANDARDS:

Mailable copy in accepted time limits.

BLOCK OR DIVISION NUMBER: 5.0 TITLE: Typing (Advanced) (cont'd.)

TASK NUMBER: 5.08 TITLE: Prepare Press Releases.

INSTRUCTIONAL OBJECTIVE - 5.08: How to Prepare Press Releases.

SKILLS: (Process Objectives)

5.081 - How to determine top margin.
5.082 - How to set up press release.
5.083 - How to determine side margins and spacing.
5.084 - How to complete first page.
5.085 - How to begin second page.

RELATED TECHNICAL INFORMATION:

- Press release format.

SUGGESTED INSTRUCTIONAL TIME: 5.08, 2 hours.

REQUIRED PERFORMANCE STANDARDS:

Mailable copy.

BLOCK OR DIVISION NUMBER: 5.0 TITLE: Typing (Advanced) (cont'd.)

TASK NUMBER: 5.09 TITLE: Prepare Medical History.

INSTRUCTIONAL OBJECTIVE - 5.09 : How to Prepare A Medical History.

SKILLS: (Process Objectives)

5.091 - How to complete medical form.
5.092 - How to type on lined form.
5.093 - How to use variable line spacer and paper release lever.

RELATED TECHNICAL INFORMATION:

- Medical history format.
- Medical forms.

SUGGESTED INSTRUCTIONAL TIME: 5.09 3-5 hours. (Introductory only)

REQUIRED PERFORMANCE STANDARDS:

Mailable copy.

BLOCK OR DIVISION NUMBER: 5.0 TITLE: Typing (Advanced) (cont'd.)

TASK NUMBER: 5.10 TITLE: Prepare Agenda and Minutes.

INSTRUCTIONAL OBJECTIVE - 5.10: How to Prepare Agenda and Minutes.

SKILLS: (Process Objectives)

5.101 - How to set margins.
5.102 - How to center headings.
5.103 - How to type side headings.

RELATED TECHNICAL INFORMATION:

- Agenda formats.
- Meeting minutes formats.

SUGGESTED INSTRUCTIONAL TIME: 5.10, 3-5 hours.

REQUIRED PERFORMANCE STANDARDS:

Mailable copy.

BLOCK OR DIVISION NUMBER: 5.0 TITLE: Typing (Advanced) (cont'd.)

TASK NUMBER: 5.11 TITLE: Prepare Manuscripts.

INSTRUCTIONAL OBJECTIVE - 5.11: How to Prepare Manuscripts.

SKILLS: (Process Objectives)

5.111 - How to set up margins.
5.112 - How to plan and type footnotes.
5.113 - How to type side headings.
5.114 - How to plan and type cover page.
5.115 - How to plan and type the bibliography.

RELATED TECHNICAL INFORMATION:

- Standard manuscript formats.

SUGGESTED INSTRUCTIONAL TIME: 5.11, 20-25 hours.

REQUIRED PERFORMANCE STANDARDS:

Mailable copy in accepted time limits.

BLOCK OR DIVISION NUMBER: 5.0 TITLE: Typewriting (Advanced) (Continued)

TASK NUMBER: 5.12 TITLE: Prepare copy from Rough Draft Material with Proofreader's Marks.

INSTRUCTIONAL OBJECTIVE - 5.12: How to Prepare Copy from Rough Draft Material With Proofreader's Marks.

SKILLS: (Process Objectives)

How To:

5.121 - Improve techniques.
5.122 - Type from rough draft copy.
5.123 - Improve grammar and punctuation skills.
5.124 - Interpret proofreader's marks.

RELATED TECHNICAL INFORMATION:

- Proofreader's marks.
- Letter placement.
- Word division rules.
- Grammar/punctuation guides.
- Letter format.

SUGGESTED INSTRUCTIONAL TIME: 5.12, 10-20 hours.

REQUIRED PERFORMANCE STANDARDS:

Mailable copy in accepted time limits.

BLOCK OR DIVISION NUMBER: 5.0 TITLE: Typewriting (Advanced) (Continued)

TASK NUMBER: 5.13 TITLE: Prepare Stencils and Duplicator Masters.

INSTRUCTIONAL OBJECTIVE - 5.13: How to Prepare Stencils and Duplicator Masters.

SKILLS: (Process Objectives)

How To:

5.131 - Justify margins.
5.132 - Use insets.
5.133 - Use illustrations.
5.134 - Use colors.
5.135 - Apply different textures to create designs or special effects.

Note: The above includes advanced skills not normally taught in basic typewriting.

RELATED TECHNICAL INFORMATION:

- Types and characteristics of duplicator masters and stencils.
- Handling cautions.
- Storage requirements, shelf life of various reproduction masters and paper.

SUGGESTED INSTRUCTIONAL TIME: 5.13, 10 hours.

REQUIRED PERFORMANCE STANDARDS:

Mailable Copy.

BLOCK OR DIVISION NUMBER: 5.0 TITLE: Typewriting (Advnaced) (Continued)

TASK NUMBER: 5.14 TITLE: Prepare Technical and Financial Reports.

INSTRUCTIONAL OBJECTIVE - 5.14: How to Prepare Technical and Financial Reports.

SKILLS: (Process Objectives)

How to:

5.141 - Set tab stops.
5.142 - Plan columns.
5.143 - Determine attractive placement.

RELATED TECHNICAL INFORMATION:

- Samples of common types of technical and financial reports.

SUGGESTED INSTRUCTIONAL TIME: 5.14, 10 hours

REQUIRED PERFORMANCE STANDARDS:

Mailable copy.

BLOCK OR DIVISION NUMBER: 5.0 TITLE: Typewriting (Advanced) (Continued)

TASK NUMBER: 5.15 TITLE: Prepare Business Forms.

INSTRUCTIONAL OBJECTIVE - 5.15: How to Prepare Business Forms.

SKILLS: (Process Objectives)

How to:

5.151 - Prepare business forms (purchase orders, invoices, bills of lading, etc.).
5.152 - Set tab stops.

RELATED TECHNICAL INFORMATION:

- Samples of common business forms.

SUGGESTED INSTRUCTIONAL TIME: 5.15, 10-15 hours.

REQUIRED PERFORMANCE STANDARDS:

Mailable copy in accepted time limits.

BLOCK OR DIVISION NUMBER: 5.0 TITLE: Typewriting (Advanced) (Continued)

TASK NUMBER: 5.16 TITLE: Prepare Charts, Tables and Other Tabulated Reports.

INSTRUCTIONAL OBJECTIVE - 5.16: How to Prepare Charts, Tables and Other Tabulated Reports.

SKILLS: (Process Objectives)

How to:

5.161 - Plan columns and set tab stops.
5.162 - Determine attractive placement.

RELATED TECHNICAL INFORMATION:

- Common types of graphs and charts.

SUGGESTED INSTRUCTIONAL TIME: 5.16, 20-30 hours.

REQUIRED PERFORMANCE STANDARDS:

Mailable copy in accepted time limits.

BLOCK OR DIVISION NUMBER: 5.0 TITLE: Typing (Advanced) (cont'd.)

TASK NUMBER: 5.17 TITLE: Prepare Legal Papers.

INSTRUCTIONAL OBJECTIVE - 5.17 : How to Prepare Legal Papers.

SKILLS: (Process Objectives)

5.171 - How to set up legal forms.
5.172 - How to set up margins.
5.173 - How to prepare a legal back and endorsement.

RELATED TECHNICAL INFORMATION:

- Legal formats.
- Common legal terms and definitions.

SUGGESTED INSTRUCTIONAL TIME: 5.17, 10 hours.

REQUIRED PERFORMANCE STANDARDS:

100% Accuracy.

BLOCK OR DIVISION NUMBER: 5.0 TITLE: Typewriting (Advanced) (Continued)

TASK NUMBER: 5.18 TITLE: Operate Automatic Typewriter. (Optional)

INSTRUCTIONAL OBJECTIVE - 5.18: How to Operate Automatic Typewriter.(Optional)

SKILLS: (Process Objectives)

How to:

5.181 -Operate and care for machine.
5.182 -Feed machine.
5.183 -Record on input media.
5.184 -Correct errors.
5.185 -Play back input media.

RELATED TECHNICAL INFORMATION:

- Know manufacturer's operating and care instructions.
- Identification of major parts of machine.
- Safety requirements.
- Storage requirements for cards, tapes, etc.

SUGGESTED INSTRUCTIONAL TIME: 5.18, 2-4 hours. (Introductory Only)
(Recommend field trip to local CC/TI, office, or word processing center, or dealer demonstration.)

REQUIRED PERFORMANCE STANDARDS:

Introductory only, Student will not receive practical experience.

TEST ITEMS

BLOCK OR DIVISION NUMBER: 5.0 TITLE: Typewriting (Advanced)

5.04 Given a printed memo form, typewriter, eraser, and message, name and department of sender and receiver, prepare an interoffice memo.
Standard: 100% in 15 minutes - 95% neatness, produces mailable copy.

5.05 Set up and type in an acceptable letter style a properly positioned business letter, given a typewriter, eraser, letterhead paper, and information for an acknowledgment letter (receipt of order).
Standard: 95% neatness and 100% accuracy in 15 minutes, produces mailable copy.

5.08 Given a typewriter, eraser, plain paper, news article, prepare for publication a news release using acceptable positioning.
Standard: 100% accuracy and 90% neatness in 20 minutes.

5.09 Given a typewriter, eraser, printed medical form, and information on a particular patient, prepare an acceptable patient history.
Standard: 100% accuracy and 90% neatness in 30 minutes.

5.10 Given a typewriter, eraser, paper, rough draft of minutes, prepare for signature an acceptable copy of minutes.
Standard: 100% accuracy and 95% neatness in 30 minutes.

5.11 Given a typewriter, eraser, paper, rough draft of manuscript with footnotes, prepare an acceptable copy of a left-bound manuscript.
Standard: 95% accuracy and 90% neatness in 30 minutes.

5.12 Given a single page of rough draft of a manuscript with proofreader's marks, necessary material and typewriter, prepare a mailable copy of the draft contents.
Standard: Mailable copy prepared in acceptable time limits; all rules adhered to in preparation of copy.

5.13 Given a duplicator master and a draft copy of material to be reproduced, prepare the master for duplication.
Standard: Material properly positioned on master, all corrections, letters and lines are clear and will print with 100% accuracy.

5.13 Given a mimeograph stencil and a copy of material to be copied, prepare the stencil for reproduction. Make a border on stencil with the typewriter.
Standard: Material properly positioned, 100% accurate, sufficiently cut to print clearly and corrections properly made. Border neat, properly proportioned and aligned.

5.14 & 5.16 Given a typewriter, paper, eraser, information for technical report including tabulated report, prepare an acceptable report which includes tabulated table.
Standard: 90% accuracy and neatness in one hour.

5.15 Given a standard, multi-copy business form blank, the information to be typed and a typewriter, fill in the form as required.
Standard: Information placed in proper spaces, accurately aligned and neat, with legible carbon copies.

5.17 Given a typewriter, eraser, legal paper, rough copy of power of attorney, prepare an acceptable power of attorney.
Standard: 100% accuracy and neatness in 30 minutes.

5.18 No test item - oral testing on machine characteristics during introduction is recommended.

EQUIPMENT LIST

BLOCK OR DIVISION: 2.0 TITLE: Typing (Beginning)

5.0 TITLE: Typing (Advanced)

1. Typewriters (one per student) (75% manual & 25% electric)
2. Overhead projector (1)
3. Record player (1)
4. Demonstration stand (1)
5. Automatic typewriter (1) [Advanced Only] (Optional)

ARTICULATION RESEARCH PROJECT
INSTRUCTIONAL GUIDE

PROGRAM: Secretarial Science/Stenographer

COURSE: Shorthand (Block 6.0)

COURSE DESCRIPTION: Department of Public Instruction: No. 6212-Shorthand I and 6213 - Shorthand II.
Department of Community Colleges: BUS 106 - Shorthand I, BUS 107 - Shorthand II, BUS 108 - Shorthand III, BUS 206 - Dictation and Transcription I, BUS 207 - Dictation and Transcription II, and BUS 208 - Dictation and Transcription III.

INSTRUCTIONAL HOURS: High Schools - 360 hours.
CC/TI - 220-330 hours.

INSTRUCTIONAL OBJECTIVES:

Sub-Block 6.10: Title - Read and Write Shorthand, Take Elementary Dictation and Transcribe.
Department of Public Instruction: Shorthand I - 6212
Department of Community Colleges: Shorthand I-BUS 106 and Shorthand II-BUS 107.

Recommended Instructional Time: 110 - 180 hours.

Module 6.10A: Includes BUS 106 and First Semester - 6212.

Instructional Objectives:
1. To learn shorthand theory.
2. To read shorthand plate material at 140 wpm.
3. To write brief forms and phrases accurately without hesitation.
4. To write shorthand at rate of 40 to 50 wpm and transcribe at rate of 10 wpm with 95% accuracy.

Module 6.10B: Includes BUS 107 and Second Semester - 6212.

Instructional Objectives:
1. To improve shorthand vocabulary.
2. To develop ability to recognize and use word sounds to construct new shorthand outlines under stress of dictation.
3. To take three "speed takes" at 60 wpm and transcribe at typewriter with 95% accuracy.
4. To take five sets (4 letters per set) at 50 to 60 wpm and transcribe as mailable letters.

Note: Continue personal development as initiated in Block 1.0 to achieve personal habits, attributes and attitudes appropriate for success as secretary/stenographer in all sub-blocks.

INSTRUCTIONAL OBJECTIVES: (continued)

Sub-Block 6.20: Title - Dictation and Transcription.
Department of Public Instruction: Shorthand II.
Department of Community Colleges: Shorthand III-BUS 108 and Dictation and Transcription-BUS 206.

Recommended Instructional Time: 110 - 180 hours.

Module 6.20A: Instructional Objectives.

1. To improve shorthand vocabulary and the ability to construct new outlines under stress of dictation.
2. To develop the ability to take dictation at the rate of 80 wpm with 95% accuracy for 3 three-minute letters of new, previewed material to be transcribed at the typewriter with 95% accuracy in 25 minutes.
3. To produce mailable copy.

(BUS 108 - 55 hours)

Module 6.20B: Instructional Objectives.

1. To review the principles of Gregg Shorthand.
2. To continue improvement of ability to construct outlines for unfamiliar words during stress of dictation.
3. To develop the ability to take dictation at the rate of 90 wpm with 95% accuracy for 3 three-minute letters of new material with 95% transcription accuracy at the typewriter in 25 minutes.
4. Produce mailable copy.

(BUS 206 - 55 hours)

Note: Minimum entry skill level for shorthand required for job qualification by U. S. Civil Service and N. C. Merit Testing is to take dictation at the rate of 80 wpm or better as in Module A above.

Note: Personal Development concurrent with instruction.

Sub-Block 6.30: Title - Take Advanced Dictation and Transcription.
Department of Public Instruction: none.
Department of Community Colleges: Dictation and Transcription-BUS 207 (55 hours)

Instructional Objectives:

1. To continue review of the principles of Gregg Shorthand.
2. To continue to develop ability to construct outlines for new words.
3. To take dictation at the rate of 100 wpm for five minutes for three new material letters, transcribe at the typewriter with 95% accuracy.
4. Produce a mailable copy.

(BUS 207 - 55 hours)

INSTRUCTIONAL OBJECTIVES: (Continued)

Sub-Block 6.30 (continued)

Note: This block is optional in areas not requiring this skill level for job qualification, however, the ability to take higher speed dictation is desirable to maintain the 80 wpm dictation level.

Note: Personal development concurrent with instruction.

Sub-Block 6.40: Title - Take High Speed Dictation and Transcribe Accurately.
Department of Public Instruction: Not taught.
Department of Community Colleges: BUS 208 (55 hours).

Instructional Objectives:

1. To continue review of principles of Gregg Shorthand.
2. To continue to develop ability to construct outlines for unfamiliar words during the stress of dictation.
3. To take dictation at the rate of 110 wpm for five minutes for three new material letters and transcribe at the typewriter with 95% accuracy producing a mailable copy.

Note: This sub-block is optional if skills not required by local area needs.

Note: Personal development concurrent with instruction.

JOB QUALIFICATION: Successful completion of at least the first three objectives of this block of instruction provides the necessary minimum qualifications in shorthand that are required for classification as a stenographer. Qualification should be verified by performance testing. Advanced shorthand completion appropriate for secretarial classifications.

PREREQUISITES: Typewriting I (Basic) may be concurrent with Module A, Sub-block 6.10.

PERFORMANCE EVALUATION: By performance and other means of competency based evaluation, employing appropriate standardized test items.

EQUIPMENT: See equipment list attached.

NOTE: DCC Course Numbers may vary between different institutions for the same course. Course title is more accurate.

BLOCK OR DIVISION NUMBER: 6.0 TITLE: Shorthand

SUB-BLOCK NUMBER: 6.10 TITLE: Read and Write Shorthand - Take Elementary Dictation and Do Transcription.

MODULE NUMBER: 6.10A TITLE: Read and Write Shorthand.

TASK NUMBER: 6.101 TITLE: Read Shorthand.

INSTRUCTIONAL OBJECTIVE - 6.101A: How to Read Shorthand.

SKILLS: (Process Objectives)

How to:

6.101A1-Read standard shorthand symbols.
6.101A2-Break down words by shorthand sounds.
6.101A3-Recognize various shorthand blends by sounds of words and identify with shorthand symbols.
6.101A4-Recognize shorthand symbols for punctuation.

RELATED TECHNICAL INFORMATION:

- Shorthand theory.
- Standard shorthand symbols.
- Word families, brief forms and phrases.
- Commonly used words and phrases.
- Phonetics and grammar rules
- Punctuation rules.
- Personal development requirements.

SUGGESTED INSTRUCTIONAL TIME: 6.101A, 20-25 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student recognizes 85% of shorthand symbols required to read if reading and writing are taught concurrently.
- If reading only is taught initially, student recognizes 95% of symbols at the rate of 150 wpm of shorthand plate material.

BLOCK OR DIVISION NUMBER: 6.0 TITLE: Shorthand (continued)

SUB-BLOCK NUMBER: 6.10 TITLE: Read and Write Shorthand - Take Elementary Dictation and do Transcription.

MODULE NUMBER: 6.10A TITLE: Read and Write Shorthand

TASK NUMBER: 6.102 TITLE: Write Shorthand.

INSTRUCTIONAL OBJECTIVE - 6.102A: How to Write Shorthand.

SKILLS: (Process Objectives)

How to:

6.102A1-Use shorthand notebook.
6.102A2-Hold and use pen in taking shorthand.
6.102A3-Write standard shorthand symbols to include correct symbol proportions.

RELATED TECHNICAL INFORMATION:

- Shorthand theory.
- Standard shorthand symbols.
- Correct tools and material for taking shorthand.
- Grammar and punctuation rules.
- Word families and brief forms.
- Personal development requirements.

SUGGESTED INSTRUCTIONAL TIME: 6.102A, 25-35 hours.

PERFORMANCE STANDARDS:

- Initially 80% accuracy in symbol construction with 95% accuracy expected at termination of this phase of instruction.

BLOCK OR DIVISION NUMBER: 6.0 TITLE: Shorthand (Continued)

SUB-BLOCK NUMBER: 6.10 TITLE: Read and Write Shorthand - Take Elementary Dictation and do Transcription.

MODULE NUMBER: 6.10B TITLE: Take Elementary Dictation and Transcribe.

TASK NUMBER: 6.103 TITLE: Take Dictation.

INSTRUCTIONAL OBJECTIVE - 6.103B: How to Take Dictation.

SKILLS: (Process Objectives)

How to:

6.103B1-Write shorthand outlines of familiar words.
6.103B2-Automatically recall frequently used words, phrases and brief forms.
6.103B3-Use brief forms and phrases.
6.103B4-Coordinate listening and shorthand writing abilities.
6.103B5-Recognize and use sounds to write shorthand outlines of new words under stress of dictation without loss of speed.
6.103B6-Develop ability to mentally retain two or more sentences during dictation progress.
6.103B7-Make changes or corrections required by the dictator during dictation.
6.103B8-Arrange shorthand notebook for writing insertions, corrections and additions.

RELATED TECHNICAL INFORMATION:

- Shorthand theory.
- Shorthand symbols.
- Correct shorthand notebook techniques.
- Business vocabulary builder.
- Phonetics, spelling, sentence structure.
- Grammar and punctuation rules.
- Dictionary and reference manuals.
- Personal development requirements.

SUGGESTED INSTRUCTIONAL TIME: 6.103B, 3-5 hours. (Introduction only, activity is continuous throughout sequence of shorthand courses.)

PERFORMANCE STANDARDS:

- 95% of dictated material is taken and writen correctly.
- Upon completion of sub-block 6.10 the student can take dictation at the rate of 60 wpm for three "speed takes" and transcribe at the typewriter with 95% accuracy.

BLOCK OR DIVISION NUMBER: 6.0 TITLE: Shorthand (continued)

SUB-BLOCK NUMBER: 6.10 TITLE: Read and Write Shorthand - Take Elementary Dictation and do Transcription.

MODULE NUMBER: 6.10B TITLE: Take Elementary Dictation and Transcribe.

TASK NUMBER: 6.104 TITLE: Transcribe Shorthand Notes Accurately.

INSTRUCTIONAL OBJECTIVE - 6.104B: How to Transcribe Shorthand Notes Accurately.

SKILLS: (Process Objectives)

How to:

6.104B1-Set up typewriter for transcription.
6.104B2-Read own shorthand notes.
6.104B3-Proofread typewritten material.

RELATED TECHNICAL INFORMATION:

- Shorthand theory.
- Shorthand symbols.
- Dictionaries and reference materials.
- Word families, brief forms and phrases.
- Spelling, punctuation and grammar rules.
- Other transcription rules.
- Personal development requirements.

SUGGESTED INSTRUCTIONAL TIME: 6.104B, 2-4 hours. (Introduction only, activity continuous throughout sequence of shorthand courses.)

PERFORMANCE STANDARDS:

- Upon completion of course, transcribed material is mailable copy.

BLOCK OR DIVISION NUMBER: 6.0 TITLE: Shorthand (continued)

SUB-BLOCK NUMBER: 6.20 TITLE: Dictation and Transcription.

Module A: BUS 108

INSTRUCTIONAL OBJECTIVES:

6.201A - How to read shorthand.
6.202A - How to write shorthand.
6.203A - How to take dictation.
6.204A - How to transcribe shorthand notes accurately.

SKILLS: (Process Objectives)

Skill requirements for the tasks and instructional objectives listed above are the same but of a higher level as those shown for like instructional objectives for Sub-Block 6.10, Modules A and B. This is a continuation of preceding instruction but with more demanding performance standards.

RELATED TECHNICAL INFORMATION:

- Related technical information required for the instructional objectives listed above are the same as those listed for like instructional objectives for Sub-Block 6.10, Modules A and B.

SUGGESTED INSTRUCTIONAL TIME: 6.20A - High Schools 90-180 hours.
CC/TI 55 hours.

REQUIRED PERFORMANCE STANDARDS:

- Take dictation at the rate of 80 wpm with 95% accuracy for 3 three-minute letters of new previewed material to be transcribed at the typewriter with 95% accuracy in 25 minutes, producing a mailable copy. All other performance standards as stated in 6.10A and 6.10B.

BLOCK OR DIVISION NUMBER: 6.0 TITLE: Shorthand (continued)

SUB-BLOCK NUMBER: 6.20 TITLE: Dictation and Transcription.

Module B: BUS 206

INSTRUCTIONAL OBJECTIVES:

6.201B - How to read shorthand.
6.202B - How to write shorthand.
6.203B - How to take dictation.
6.204B - How to transcribe shorthand notes accurately.

SKILLS: (Process Objectives)

Skill requirements for the tasks and instructional objectives listed above are the same but of a higher level as those shown for like instructional objectives for Sub-Block 6.10, Modules A and B.

RELATED TECHNICAL INFORMATION:

As required for appropriate like instructional objectives in Sub-Block 6.10, Modules A and B.

SUGGESTED INSTRUCTIONAL TIME: 6.20B - High Schools 90 hours. (If taught)
CC/TI 55 hours.

REQUIRED PERFORMANCE STANDARDS:

- Take dictation at the rate of 90 wpm with 95% accuracy for 3 three-minute letters of new material with transcription accuracy at the typewriter of 95%. Produces a mailable copy. All other performance standards are as stated in 6.10 A and B.

BLOCK OR DIVISION NUMBER: 6.0 TITLE: Shorthand (continued)

SUB-BLOCK NUMBER: 6.30 TITLE: Advanced Dictation and Transcription.

INSTRUCTIONAL OBJECTIVES:

6.301 - How to read shorthand.
6.302 - How to write shorthand.
6.303 - How to take dictation.
6.304 - How to transcribe shorthand notes accurately.

SKILLS: (Process Objectives)

Skill requirements for the tasks and instructional objectives listed above are the same but of a higher level as those shown for like instructional objectives for Sub-Block 6.10, Modules A and B.

RELATED TECHNICAL INFORMATION:

- Same as that required for appropriate like instructional objectives stated in 6.10 A and B.

SUGGESTED INSTRUCTIONAL TIME: 6.30, 55 hours. (Not taught in High School)

REQUIRED PERFORMANCE STANDARDS:

- Take dictation at the rate of 100 wpm for five minutes for three new material letters with 95% accuracy. Transcribe at the typewriter with 95% accuracy producing a mailable copy.

BLOCK OR DIVISION NUMBER: 6.0 TITLE: Shorthand (continued)

SUB-BLOCK NUMBER: 6.40 TITLE: Take High Speed Dictation and Transcribe Accurately.

INSTRUCTIONAL OBJECTIVES:

6.401 - How to read shorthand.
6.402 - How to write shorthand.
6.403 - How to take dictation.
6.404 - How to transcribe shorthand notes accurately.
6.405 - How to acquire and demonstrate personal attitudes, habits and attributes appropriate for a successful stenographer/secretary.

SKILLS: (Process Objectives)

Skill requirements for the tasks and instructional objectives listed above are the same but of a higher level as those shown for like instructional objectives in Sub-Block 6.10, Modules A and B.

RELATED TECHNICAL INFORMATION:

- Same as that required for like instructional objectives listed in 6.10, Modules A and B.

SUGGESTED INSTRUCTIONAL TIME: 6.40, 55 hours. (Not taught in High School)

REQUIRED PERFORMANCE STANDARDS:

- Take dictation at the rate of 110 wpm for five minutes for three new material letters with 95% accuracy and transcribe at the typewriter with 95% accuracy producing a mailable copy.

COMPETENCY BASED OUTLINE TYPE TEST ITEMS

Sub-Block 6.10A (BUS 106)

TASK

6.101A a. Given shorthand plate material the student will read the material.
Standard: Read at a minimum rate of 150 wpm.

6.102A b. The student will be required to write a series of shorthand theory outlines and transcribe these outlines in longhand.
Standard: Write transcription at 10 wpm with 85% accuracy.

6.101A & 6.102A c. The student will take dictation from shorthand plate material or graded speed takes.
Standard: Take dictation at 40 to 50 wpm for at least two minutes and transcribe notes verbatim in longhand at the rate of 10 wpm with 95% accuracy.

Sub-Block 6.10B (BUS 107)

TASK

6.103B The student will take dictation from previewed material for 5 sets of 4 letters each.
Standard: Take dictation at the rate of 50 to 60 wpm.

6.104B Given a typewriter and the dictation notes taken in 6.103B (above) the student will transcribe the notes accurately with a typewriter.
Standard: Produces a mailable copy.

Sub-Block 6.20 - Module A - (BUS 108) (Shorthand II)

TASK

6.201A The student will take 3 five-minute takes of new material dictation and
6.202A transcribe at the typewriter.
6.203A Standard: Take dictation at 80 wpm, transcribe at the typewriter with
6.204A 95% accuracy and produce a mailable copy.

Sub-Block 6.20 - Module B - (BUS 206)

TASK

6.201B Given 3 five-minute speed takes of new material dictation, dictated at
6.202B the rate of 90 wpm, and a typewriter the student will take dictation and
6.203B transcribe at the typewriter.
6.204B Standard: Take dictation at the rate of 90 wpm and transcribe at the typewriter with 95% accuracy producing a mailable copy.

TEST ITEMS
(Con't.)

Sub-Block 6.30 (BUS 207)

TASK

6.301 Given 3 five-minute takes of new material dictation delivered at 100 wpm
6.302 and a typewriter, with necessary material, the student will take dictation
6.303 at 100 wpm and transcribe at the typewriter.
6.304 Standard: Take dictation at the rate of 100 wpm with 95% accuracy.
Produce a mailable copy.

Sub-Block 6.40 (BUS 208)

TASK

6.401 Given 3 five-minute takes of new material to be delivered at the rate
6.402 of 110 wpm and a typewriter with necessary material, the student will
6.403 take dictation and transcribe at the typewriter.
6.404 Standard: Take dictation at 110 wpm and transcribe at the typewriter
with 95% accuracy producing a mailable copy.

EQUIPMENT

BLOCK OR DIVISION NUMBER: 6.0 TITLE: Shorthand

1. Record player (1).
2. Dictation records (full range of speeds).
3. Tape players (cassette) - (one for each four students).

ARTICULATION RESEARCH PROJECT
INSTRUCTIONAL GUIDE

PROGRAM: Executive Secretary/Stenographer/Business Education

COURSE: Accounting I - Block 7.0

COURSE DESCRIPTION:

Department of Public Instruction - 6332- Accounting I.
Department of Community Colleges - BUS 120 - Accounting I.

INSTRUCTIONAL HOURS:

High Schools: 180 hours.
CC/TI: 88 Hours.

INSTRUCTIONAL OBJECTIVES:

To provide the learner with the necessary procedural techniques and related technical information to apply the basic principles of the accounting cycle from the analysis and recording of business transactions to the preparation and interpretation of financial statements and supporting data, including an introduction to flow charts and systems. Instruction includes the why as well as the how, and attention is given to payroll and related taxes.

JOB QUALIFICATIONS:

The learner is qualified to perform basic bookkeeping functions following successful completion of this block of instruction. Job qualification should be determined by applied performance testing.

PREREQUISITES:

Business Math recommended.

PERFORMANCE EVALUATION:

See test items attached.

EQUIPMENT:

See Equipment List attached.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I

TASK NUMBER: 7.01 TITLE: Journalize Daily Transactions.

INSTRUCTIONAL OBJECTIVE - 7.01: How to Journalize Daily Transactions.

SKILLS: (Process Objectives)

How to:

7.011 - Classify accounts.
7.012 - Determine debit and credit parts.
7.013 - Record debit and credit parts.

RELATED TECHNICAL INFORMATION:

- The basic accounting equation.
- The effects of debits and credits on accounts.
- The different kinds of journals.

SUGGESTED INSTRUCTIONAL TIME: 7.01, 20 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility with accuracy in calculations and required steps taken and applied correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.02 TITLE: Posting Transactions.

INSTRUCTIONAL OBJECTIVE - 7.02: How to Post Transactions.

SKILLS: (Process Objectives)

How to:

7.021 - Make chart of accounts.
7.022 - Open a ledger.
7.023 - Transfer information from journal into ledger (steps of posting).

RELATED TECHNICAL INFORMATION:

- Classification of accounts.
- Steps in posting.

SUGGESTED INSTRUCTIONAL TIME: 7.02, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility required with accuracy in calculations, and all required steps taken and applied correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I

TASK NUMBER: 7.03 TITLE: Closing a Set of Books.

INSTRUCTIONAL OBJECTIVE - 7.03: How to Close a Set of Books.

SKILLS: (Process Objectives)

How To:

7.031 - Prepare a trial balance.
7.032 - Complete a six-column work sheet.
7.033 - Prepare financial statements.
7.034 - Journalize closing entries.
7.035 - Post closing entries.
7.036 - Balance and rule ledger.
7.037 - Prepare a post-closing trial balance.

RELATED TECHNICAL INFORMATION:

- Classification of accounts.
- Steps for balancing accounts.
- Format for work sheet.
- Format for financial statements.
- Source of information for closing entries.
- Proper procedure for ruling accounts.
- Format for post-closing trial balance.
- Projects I and II.

SUGGESTED INSTRUCTIONAL TIME: 7.03, 20 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility required with accuracy in all calculations; all required steps taken and applied correctly for task.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.04 TITLE: Maintain Accounts Receivable and Payable Records.

INSTRUCTIONAL OBJECTIVE - 7.04: How to Maintain Accounts Receivable and Payable Records.

SKILLS: (Process Objectives)

How to:

7.041 - Check sales invoices and purchase invoice for accuracy.
7.042 - Journalize accounts receivable and accounts payable transactions.
7.043 - Post to individual accounts.
7.044 - Post to control account.
7.045 - Compile schedule of accounts receivable and accounts payable.

RELATED TECHNICAL INFORMATION:

- Basic accounting equation.
- Journalizing.
- Posting procedures.
- Combination journal.

SUGGESTED INSTRUCTIONAL TIME: 7.04, 10 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility required with accuracy in posting and calculations; applies required skills and related information correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.05 TITLE: Prepare a Trial Balance.

INSTRUCTIONAL OBJECTIVE - 7.05: How to Prepare a Trial Balance.

SKILLS: (Process Objectives)

How to:

7.051 - Find account balance.
7.052 - Record on form.
7.053 - Check equality of debit and credit.
7.054 - Use steps to locate errors.
7.055 - Correct errors.

RELATED TECHNICAL INFORMATION:

- Format for trial balance.
- Steps for locating and correcting errors.
- Business Simulation - Part I.

SUGGESTED INSTRUCTIONAL TIME: 7.05, 20 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility required with accuracy in calculations, applies skills and related technical information correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.06 TITLE: Maintain Checking Accounts.

INSTRUCTIONAL OBJECTIVE - 7.06: How to Maintain Checking Accounts.

SKILLS: (Process Objectives)

How To:

7.061 - Handle deposits.
7.062 - Write checks.
7.063 - Complete check stubs.

RELATED TECHNICAL INFORMATION:

- Need for basic writing and arithmetic skills.
- Definition and purpose of checking accounts.
- Bank checking account policies and procedures.

SUGGESTED INSTRUCTIONAL TIME: 7.06, 2 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility required with accuracy in calculations; demonstrates ability to apply skills correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.07 TITLE: Reconcile a Bank Statement.

INSTRUCTIONAL OBJECTIVE: 7.07: How to Reconcile a Bank Statement.

SKILLS: (Process Objectives)

How to:

7.071 - Compare cancelled checks with check stubs.
7.072 - Check for outstanding bank deposits.
7.073 - Compare adjusted bank balance with adjusted check stub balance.

RELATED TECHNICAL INFORMATION:

- Steps used in reconciling a bank statement.

SUGGESTED INSTRUCTIONAL TIME: 7.07, 3 hours.

REQUIRED PERFORMANCE STANDARDS:

Accuracy in calculations, using proper steps in correct sequence.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.08 TITLE: Prepare a Work Sheet.

INSTRUCTIONAL OBJECTIVE - 7.08: How to Prepare a Work Sheet.

SKILLS: (Process Objectives)

How to:

7.081 - Record trial balance on work sheet.
7.082 - Make asset and expense adjustments.
7.083 - Extend balance sheet items and income statement amounts.
7.084 - Find net income or loss.

RELATED TECHNICAL INFORMATION:

- Format for a work sheet.

SUGGESTED INSTRUCTIONAL TIME: 7.08, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

Accuracy in calculations, applying proper procedures in appropriate sequence.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.09 TITLE: Prepare Financial Statements.

INSTRUCTIONAL OBJECTIVE - 7.09: How to Prepare Financial Statements.

SKILLS: (Process Objectives)

How to:

7.091 - Prepare income statement.
7.092 - Prepare capital statement.
7.093 - Prepare balance sheet.

RELATED TECHNICAL INFORMATION:

- Format for each of the above financial statements.

SUGGESTED INSTRUCTIONAL TIME: 7.09, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and accuracy required with accuracy in calculations; using proper format for each action and applying required skills and related information correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.10 TITLE: Journalize Adjusting and Closing Entries.

INSTRUCTIONAL OBJECTIVE - 7.10: How to Journalize Adjusting and Closing Entries.

SKILLS: (Process Objectives)

How to:

7.101 - Record the adjusting entries in the journal.
7.102 - Record the closing entries in the journal.
7.103 - Post adjusting and closing entries.

RELATED TECHNICAL INFORMATION:

- Source of information for adjusting entries.
- Source of information for closing entries.

SUGGESTED INSTRUCTIONAL TIME: 7.10, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility required with accuracy in calculations, utilizing proper information sources and applying required skills and information correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.11 TITLE: Close the Ledger.

INSTRUCTIONAL OBJECTIVE - 7.11: How to Close the Ledger.

SKILLS: (Process Objectives)

How to:

7.111 - Balance and rule balance sheet accounts.
7.112 - Close and rule income, cost, and expense accounts.
7.113 - Prepare post-closing trial balance.

RELATED TECHNICAL INFORMATION:

- Steps for balancing accounts.
- Proper procedure for ruling accounts.
- Business Simulation - Part II.

SUGGESTED INSTRUCTIONAL TIME: 7.11, 15 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility required with accuracy in calculations, using proper steps and procedures for actions and applying skills correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.12 TITLE: Prepare Payroll Records.

INSTRUCTIONAL OBJECTIVE - 7.12: How to Prepare Payroll Records.

SKILLS: (Process Objectives)

How to:

7.121 - Analyze time cards.
7.122 - Prepare the payroll register.
7.123 - Keep employees' records.
7.124 - Pay the payroll.
7.125 - Journalize the payroll and the employer's payroll taxes.
7.126 - Pay taxes to state and federal governments.
7.127 - Prepare payroll tax reports.

RELATED TECHNICAL INFORMATION:

- Tax information and regulations for payroll systems.
- Employees' withholding exemption information.

SUGGESTED INSTRUCTIONAL TIME: 7.12, 10 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility required with accuracy in calculations, demonstrating ability to apply required skills and related information correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.13 TITLE: Special Journals.

INSTRUCTIONAL OBJECTIVES - 7.13: How to Use Purchases, Cash Payments, and Four-Column General Journal.

SKILLS: (Process Objectives)

How to:

7.131 - Record purchases on account.
7.132 - Post the purchase journal.
7.133 - Compute purchases discounts.
7.134 - Record cash payments.
7.135 - Post cash payments journal.
7.136 - Record purchases returns and allowances.
7.137 - Record other miscellaneous transactions.
7.138 - Post four-column general journal.

RELATED TECHNICAL INFORMATION:

- Classification of transactions.
- Format of journals.
- Use of subsidiary ledgers.

SUGGESTED INSTRUCTIONAL TIME: 7.13, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility required with accuracy in calculations, and the ability to apply required skills and information correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.14 TITLE: Special Journals

INSTRUCTIONAL OBJECTIVE - 7.14: How to Use Sales, Cash Receipts, and Four-Column General Journal.

SKILLS: (Process Objectives)

How to:

7.141 - Record sales on account.
7.142 - Post the sales journal.
7.143 - Compute sales discounts.
7.144 - Record cash receipts.
7.145 - Post cash receipts journal.
7.146 - Record sales returns and allowances.
7.147 - Record other miscellaneous transactions.
7.148 - Post the four-column general journal.
7.149 - Complete accounting cycle.

RELATED TECHNICAL INFORMATION:

- Classification of transactions.
- Format of journals.
- Use of subsidiary ledgers.
- Format of work sheet.
- Format of financial statements.
- Project III.

SUGGESTED INSTRUCTIONAL TIME: 7.14, 10 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility with accuracy in calculations and the ability to apply required skills and information.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.15 TITLE: Maintain Petty Cash Account

INSTRUCTIONAL OBJECTIVE - 7.15: How to Maintain Petty Cash Account.

SKILLS: (Process Objectives)

How to:

7.151 - Establish a petty cash account.
7.152 - Replenish a petty cash account.

RELATED TECHNICAL INFORMATION:

- Use of vouchers and receipts.

SUGGESTED INSTRUCTIONAL TIME: 7.15, 3 hours.

REQUIRED PERFORMANCE STANDARDS:

-Accuracy in calculations applying proper techniques correctly and accounting for all expenditures/receipts in petty cash fund.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.16 TITLE: Maintain Cash Register System Records (6310)

INSTRUCTIONAL OBJECTIVE - 7.16 : How to Record Cash Register Transactions.

SKILLS: (Process Objectives)

How To:

7.161 - Record transactions in a cash register system.
7.162 - Prove cash using this system.

RELATED TECHNICAL INFORMATION:

- Cash proof and balance slip.

SUGGESTED INSTRUCTIONAL TIME: 7.16, 2 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility required with accuracy in calculations and applying the proper procedures correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I

TASK NUMBER: 7.17 TITLE: Maintain Sales Tax Records.

INSTRUCTIONAL OBJECTIVE - 7.17: How to Maintain Sales Tax Records.

SKILLS: (Process Objectives)

How to:

7.171 - Compute sales tax and read sales tax tables.
7.172 - Journalize charge and cash sales with sales tax.
7.173 - Pay sales taxes to the government.

RELATED TECHNICAL INFORMATION:

- Sales tax tables.

SUGGESTED INSTRUCTIONAL TIME: 7.17, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility required with accuracy in calculations and the ability to apply required skills correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.18 TITLE: Compute and Record Bad Debts.

INSTRUCTIONAL OBJECTIVE - 7.18: How to Compute and Record Bad Debts.

SKILLS: (Process Objectives)

How to:

7.181 - Estimate bad debts.
7.182 - Journalize transactions for bad debts.
7.183 - Determine and write off bad debts.

RELATED TECHNICAL INFORMATION:

- Methods for estimating bad debts.

SUGGESTED INSTRUCTIONAL TIME: 7.18, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility of records with accuracy in calculations and the ability to apply required skills and information correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.19 TITLE: Determine Depreciation and Disposal of Plant Assets.

INSTRUCTIONAL OBJECTIVE - 7.19: How to Determine Depreciation and Disposal of Plant Assets.

SKILLS: (Process Objectives)

How to:

7.191 - Determine and record the amount of depreciation expense.
7.192 - Compute book value of a plant asset.
7.193 - Record the scrapping or sale of plant assets.
7.194 - Record the trading of plant assets.

RELATED TECHNICAL INFORMATION:

- Three methods of disposing of plant assets.

SUGGESTED INSTRUCTIONAL TIME: 7.19, 10 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility of work required with accuracy in calculations and the ability to apply skills and information correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.20 TITLE: Handle Notes and Interest.

INSTRUCTIONAL OBJECTIVE - 7.20: How to Handle Notes and Interest.

SKILLS: (Process Objectives)

How to:

7.201 - Figure the due date.
7.202 - Compute interest with and without interest tables.
7.203 - Record all entries pertaining to notes.

RELATED TECHNICAL INFORMATION:

- Use of calendar in computing due date.
- Definition of terms.

SUGGESTED INSTRUCTIONAL TIME: 7.20, 7 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility of work required with accuracy in calculations and ability to apply skills and related information correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.21 TITLE: Use the Accrual Accounting System.

INSTRUCTIONAL OBJECTIVE - 7.21: How to Compute Accrued Income and Expenses.

SKILLS: (Process Objectives)

How to:

7.211 - Compute and record accrued income and expenses.
7.212 - Record reversing entries for accruals.
7.213 - Post above entries.

RELATED TECHNICAL INFORMATION:

- Amount of interest accrued needed for adjusting and reversing entries.

SUGGESTED INSTRUCTIONAL TIME: 7.21, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility of work required with accuracy in calculations and the ability to apply skills and related technical information correctly.

BLOCK OR DIVISION NUMBER: 7.0 TITLE: Accounting I (Continued)

TASK NUMBER: 7.22 TITLE: Use Automated Data Processing and Concepts (6310)

INSTRUCTIONAL OBJECTIVE - 7.22: How to Use Automated Data Processing and Concepts in Record Keeping.

SKILLS: (Process Objectives)

How to:

7.221 - Describe the concepts of ADP.
7.222 - Prepare a chart of accounts for ADP.
7.223 - Prepare necessary forms for ADP.
7.224 - Analyze punch cards.

RELATED TECHNICAL INFORMATION:

- Manual system accounting cycle.
- Definition of ADP terms.
- Flow chart symbols.

SUGGESTED INSTRUCTIONAL TIME: 7.22, 8 hours. (Introductory only)

REQUIRED PERFORMANCE STANDARDS:

Neatness and legibility required with accuracy and use of forms recording information; applies skills and related technical information correctly.

TEST ITEMS

BLOCK OR DIVISION NUMBER: 7.0 **TITLE:** Accounting I

TASKS: 7.01 through 7.22

Given questions and problems covering the basic operations included in each task, the students will satisfactorily answer questions and complete operational functions. 80% accuracy is considered as minimum acceptable score for job qualification or advanced credit.

EQUIPMENT LIST

BLOCK OR DIVISION: 7.0 TITLE: Accounting I

TASKS: 7.01 through 7.22

One adding machine for every three students.
Overhead projector.

ARTICULATION RESEARCH PROJECT
INSTRUCTIONAL GUIDE

PROGRAM: Executive Secretary (DCC T030) and Stenographer (High School)

COURSE: Office Procedures (Office Practice-Block 8.0)

COURSE DESCRIPTION: Department of Public Instruction 6410 - Office Practice
(Included in 6410 & 6431)
Department of Community Colleges - BUS 214 - Office Procedures
BUS 215 - Office Applications

INSTRUCTIONAL HOURS: High Schools - 180 or 360 hours
CC/TI - 143 hours

INSTRUCTIONAL OBJECTIVES:

1. To inform the learner regarding certain common responsibilities of a secretary encountered during the work day. These include the following: receptionist duties, handling the mail, telephone techniques, obtaining travel information, processing telegrams, maintaining office records, handling purchasing of office supplies, recommending office organization, handling insurance claims, and correspondence, plus taking dictation, typing and records management. (CC/TI allocates 55 hours; the high schools allocate part of 90 to 240 hours.)

2. To provide the learner with an opportunity for practical work application in an actual or simulated office environment. (CC/TI allocates approximately 88 hours to the foregoing, 90 to 240 hours allocated to the secondary schools for office procedures.)

3. This block of instruction is also currently used by the high schools to present initial instruction contained in Blocks 1.0 (Personal Development, 2.5 (Records Management), 3.0 (Business Machines-Calculating), and 4.0 (Business Machines-Reproduction), concurrently with the application of the skills acquired in completed blocks of instruction. Approximately 120 hours from this block should be devoted to instruction in the blocks listed above by the high schools if not taught independently or earlier in the program.

JOB QUALIFICATIONS:

Successful completion of this block plus the preceding blocks of the program provides the CC/TI graduate with the instruction required for qualification as an executive secretary. The high school student who completes all high school taught courses (blocks) has demonstrated the skills required for qualification as a stenographer. Job qualification to be determined by applied performance testing.

PREREQUISITES:

High Schools: Typing I (others depend on career objectives).
CC/TI: The learner should have successfully completed all other blocks of instruction in the Executive Secretary program.

PERFORMANCE EVALUATION:

See test items provided with preceding blocks of instruction, plus the secretarial duties test items with this block. Employment of joint test teams recommended to determine job qualification as well as high school work to be applied for advanced credit at the post-secondary level.

EQUIPMENT: See attached equipment list.

ARTICULATION RESEARCH PROJECT
INSTRUCTIONAL OBJECTIVES

SECRETARIAL SCIENCE

BLOCK OR DIVISION NUMBER: 8.0 TITLE: Office Procedures (Office Practice)

TASK NUMBER: 8.01 TITLE: Perform Limited Houskeeping Related to Office Equipment, Supplies and Office Decor.

INSTRUCTIONAL OBJECTIVE - 8.01: How to Perform Limited Houskeeping Related to Office Equipment, Supplies, and Office Decor.

SKILLS: (Process Objectives)

How to:

8.011 - Perform duties as situations demand.
8.012 - Maintain an orderly desk and supply area.
8.013 - Keep equipment clean and in running order.

RELATED TECHNICAL INFORMATION:

- Machine parts.
- Types of cleaning materials
- Making coffee.

SUGGESTED INSTRUCTIONAL TIME: 8.01, 2 hours.

Note: Additional time for practical work application is provided in Office Application - Tasks 8.11-8.19.

RELATED GENERAL INFORMATION:

- A recent national study of the normal daily tasks performed by the average secretary determined that 3 areas of performance requirements were paramount, e.g.: Typing, Communication, and Records Management.

VOCATIONAL GUIDANCE:

The secretary's duties may vary widely in many offices from a limited number of duties performed for one or more persons to a wide variety performed by an executive secretary who may act as an executive assistant to the executive to whom assigned. Under such conditions, the secretary may have certain supervisory or managerial functions.

REQUIRED PERFORMANCE STANDARDS:

Demonstrates ability to perform designated aasks in an organized manner.
Follows manufacturer's specifications in operator care of equipment.
Maintains a neat, orderly work area.

BLOCK OR DIVISION NUMBER: 8.0 TITLE: Office Procedures (Office Practice) (con't.)

TASK NUMBER: 8.02 TITLE: Process Mail.

INSTRUCTIONAL OBJECTIVE - 8.02: How to Process Mail.

SKILLS: (Process Objectives)

8.021 - How to use a ZIP Code directory.
8.022 - How to establish and review incoming and outgoing mail procedures.
8.023 - How to forward mail.
8.024 - How to receive and place telegrams and cablegrams.
8.025 - How to process insured mail, registered mail, and certified mail.
8.026 - How to weigh items and use correct postage.
8.027 - How to date and stamp incoming mail.
8.028 - How to route mail.
8.029 - How to wrap, tie, and label packages.

RELATED TECHNICAL INFORMATION:

- Common postal regulations.

SUGGESTED INSTRUCTIONAL TIME: 8.02, 5 hours.

Note: Additional time for practical work application is provided in Office Application - Tasks 8.11-8.19.

Required Performance Standards:

- Demonstrates ability to identify and list the different major mail classifications and state their use.
- Demonstrates ability to sort incoming mail according to personal and official, to prepare official executive correspondence for scrutiny by the executive, and route appropriate items to the staff.
- Demonstrates ability to prepare different classifications of mail for mailing.
- Can use postal scales to determine postage, required for specific mail item.
- Demonstrates ability to use ZIP Code Catalog.

BLOCK OR DIVISION NUMBER: 8.0 TITLE: Office Procedures (Office Practice) (cont'd.)

TASK NUMBER: 8.031 TITLE: Make Appointments.

INSTRUCTIONAL OBJECTIVE - 8.031: How to Make Appointments.

SKILLS: (Process Objectives)

8.0311 - How to schedule appointments.
8.0312 - How to maintain a calendar of appointments.
8.0313 - How to handle cancellations.
8.0314 - How to arrange for special facilities.
8.0315 - How to greet visitors.
8.0316 - How to keep a record of all callers.
8.0317 - How to handle difficult callers.
8.0318 - How to handle appointment delays.
8.0319 - How to aid employer in maintaining planned schedule.

RELATED TECHNICAL INFORMATION:

SUGGESTED INSTRUCTIONAL TIME: 8.031, 3 hours.

Note: Additional time for practical work application is provided in Office Application - Tasks 8.11 through 8.19.

Required Performance Standards:

- Demonstrates ability to make appointments for employer and to keep an appointment calendar - Who? What? Where? When? Why?
- Keeps employer's personal appointment calendar up-to-date, with pertinent information.

BLOCK OR DIVISION NUMBER: 8.0 TITLE: Office Procedures (Office Practice) (Continued)

TASK NUMBER: 8.032 TITLE: Use Telephone and Relay Information as Directed.

INSTRUCTIONAL OBJECTIVE - 8.032: How to Use Telephone and Relay Information.

SKILLS: (Process Objectives)

How to:

8.0321 - Maintain information to be relayed.
8.0322 - Use telephone for local calls.
8.0323 - Make long distance calls.
8.0324 - Handle difficult callers.
8.0325 - Use telephone directory.

RELATED TECHNICAL INFORMATION:

- Telephone courtesy.
- Telephone directory contents.
- Purpose and use of yellow pages.
- Telephone signals (busy, off hook, etc.)

SUGGESTED INSTRUCTIONAL TIME: 8.032: 3 hours.

Note: Additional time for practical work application is provided in Office Application - Tasks 8.11 through 8.19.

REQUIRED PERFORMANCE STANDARDS:

- Demonstrates ability to receive and relay a telephone or other verbal message with 100% accuracy.
- Demonstrates ability to find required information in telephone directory with 100% accuracy.
- Follows correct telephone procedures.
- Locates and uses correct dialing information in making various long distance calls.

BLOCK OR DIVISION NUMBER: 8.0 TITLE: Office Procedures (Office Practice) (cont'd.)

TASK NUMBER: 8.04 TITLE: Requisition Supplies and Equipment.

INSTRUCTIONAL OBJECTIVE - 8.04: How to Requisition Office Supplies and Equipment.

SKILLS: (Process Objectives)

8.041 - How to fill out requisition form.
8.042 - How to locate supply catalog information.
8.043 - How to channel requisition to proper office.

RELATED TECHNICAL INFORMATION:

- Information normally required on formal supply and materials requisitions.

SUGGESTED INSTRUCTIONAL TIME: 8.04, 1-5 hours.

Note: Additional time for practical work application is provided in Office Application - Tasks 8.11 through 8.19.

Required Performance Standards:

- Demonstrates ability to use office supply requisition catalog with 100% accuracy.
- Demonstrates ability to fill out supply requisition form or purchase order, neatly, with 100% accuracy for item identification and quantity required. Carbon copies legible. Keeps copy for file.

BLOCK OR DIVISION NUMBER: 8.0 TITLE: Office Procedures (Office Practice (con't.)

TASK NUMBER: 8.05 TITLE: Maintain Inventory of Equipment and Consumables in Office.

INSTRUCTIONAL OBJECTIVE - 8.05: How to Maintain Inventory of Equipment and Consumables in Office.

SKILLS: (Process Objectives)

8.051 - How to keep perpetual inventories.
8.052 - How to take physical inventories.

RELATED TECHNICAL INFORMATION:

- Purpose of inventories.

SUGGESTED INSTRUCTIONAL TIME: 8.05, 1-2 hours.

Note: Additional time for practical work application is provided in Office Application - Tasks 8.11 through 8.19.

Required Performance Standards:

- Identifies equipment items listed on inventory cards with 90% accuracy and makes a 100% accurate count.
- Picks up unlisted items on inventory cards with proper nomenclature and serial number.

BLOCK OR DIVISION NUMBER: 8.0 TITLE: Office Procedures (Office Practice) (Continued)

TASK NUMBER: 8.061 TITLE: Keep Petty Cash Account.

INSTRUCTIONAL OBJECTIVE - 8.061: How to Maintain Petty Cash Account.

SKILLS: (Process Objectives)

How to:

8.0611 - Establish the petty cash fund.
8.0612 - Make payments from the fund.
8.0613 - Replenish the fund.
8.0614 - Keep legible and accurate records.

SUGGESTED INSTRUCTIONAL TIME: 8.061, 3-5 hours.

Note: Additional time for practical work application is provided in Office Application - Tasks 8.11 through 8.19.

REQUIRED PERFORMANCE STANDARDS:

- Demonstrates ability to maintain a neat, legible petty cash fund record with appropriate information and supporting vouchers according to standard bookkeeping procedures. 100% accuracy in items entered and able to balance account.
- Demonstrates ability to write a check and make stub entries with 100% accuracy.

BLOCK OR DIVISION NUMBER: 8.0 TITLE: Office Procedures (Office Practice) (Continued)

TASK NUMBER: 8.062 TITLE: Perform Personal Duties for Employer When Necessary and Ethical.

INSTRUCTIONAL OBJECTIVE - 8.062: How to Perform Personal Duties for Employer When Necessary and Ethical.

SKILLS: (Process Objectives)

How to:

8.0621 - Maintain employers business related checking account.
8.0622 - Make coffee when in job description.
8.0623 - Perform business related employers personal services (errands, shopping, bill paying, etc.).

RELATED TECHNICAL INFORMATION:

- Business ethics.
- Personal ethics.
- Confidentiality.
- Loyalty.

SUGGESTED INSTRUCTIONAL TIME: 8.062, 5-10 hours.

Note: Additional time for practical work application is provided in Office Application - Tasks 8.11 through 8.19.

REQUIRED PERFORMANCE STANDARDS:

Personal observation of poise and attitude.

BLOCK OR DIVISION NUMBER: 8.0 TITLE: Office Procedures (Office Practice (con't.)

TASK NUMBER: 8.07 TITLE: Maintain Record of Events and Changes in Policies and Procedures.

INSTRUCTIONAL OBJECTIVE - 8.07: How to Maintain Record of Events and Changes in Policies and Procedures.

SKILLS: (Process Objectives)

8.071 - How to maintain current records of policies.
8.072 - How to record all changes in existing policies and procedures.

RELATED TECHNICAL INFORMATION:

- Definition of policies.

SUGGESTED INSTRUCTIONAL TIME: 8.07, 2-5 hours.

Note: Additional time for practical work application is provided in Office Application - Tasks 8.11 through 8.19.

Required Performance Standards:

- Demonstrates ability to keep an activity log of events with 90% accuracy (visitors, actions, official phone calls, etc.)
- Demonstrates ability to make policy and procedures file changes and keep it current - 90% accuracy.

BLOCK OR DIVISION NUMBER: 8.0 TITLE: Office Procedures (Office Practice) (Continued)

TASK NUMBER: 8.08 TITLE: Perform Receptionist Duties.

INSTRUCTIONAL OBJECTIVE - 8.08: How to Perform Receptionist Duties.

SKILLS: (Process Objectives)

How to:

8.081 - Greet callers.
8.082 - Display proper speech habits.
8.083 - Maintain a proper appearance.
8.084 - Handle incoming phone calls and record outgoing calls.
8.085 - Give directions clearly to different locations.
8.086 - Perform general office duties.
8.087 - Handle difficult callers.
8.088 - Work PBX (Desk type switchboard).

RELATED TECHNICAL INFORMATION:

- Importance of good personal appearance.
- The organization image.
- Receptionist functions.
- Making and serving coffee.
- Switchboard

SUGGESTED INSTRUCTIONAL TIME: 8.08 5 hours.

Note: Additional time for practical work application is provided in Office Application - Tasks 8.11 through 8.19.

REQUIRED PERFORMANCE STANDARDS:

- Maintains person and work area in neat, organized manner.
- Demonstrates courteous, pleasant, and helpful attitude with visitors.
- Announces visitors to employer by name and firm or title with 100% accuracy.
- Demonstrates courteous and proper telephone procedures.
- Gives simple directions to a specific office accurately.

BLOCK OR DIVISION NUMBER: 8.0 TITLE: Office Procedures (Office Practice)cont'd.)

TASK NUMBER: 8.09 TITLE: Supervise Other Employees, When Required.

INSTRUCTIONAL OBJECTIVE - 8.09: How to Supervise Other Employees.

SKILLS: (Process Objectives)

8.091 - How to plan and execute tasks.
8.092 - How to practice effective communication.
8.093 - How to keep abreast of current events and innovations.
8.094 - How to tactfully give constructive criticism.
8.095 - How to handle conflicts between subordinates.
8.096 - How to coordinate activities among subordinates and assign tasks.
8.097 - How to perform personnel evaluation objectively.

RELATED TECHNIC INFORMATION:

SUGGESTED INSTRUCTIONAL TIME: 8.09, 2 hours.

Note: Additional time for practical work application is provided in Office Application - Tasks 8.11 through 8.19.

Required Performance Standards:

- Demonstrates ability to give work instructions in a clear, uncomplicated manner.
- Avoids display of favoritism or bias in dealing with subordinates.
- Makes fair work assignments according to abilities and work loads.
- Demonstrates ability to make constructive criticism in a tactful manner.
- Demonstrates ability to maintain order and resolve minor conflicts.
- Coordinates actions as necessary with other office activities.
- Requires maintenance of established and announced work performance and office personal conduct standards.

BLOCK OR DIVISION NUMBER: 8.0 TITLE: Office Procedures (Office Practice) (con't.)

TASK NUMBER: 8.10 TITLE: Arrange Business Social Activities.

INSTRUCTIONAL OBJECTIVE - 8.10: How to Arrange Business Social Activities.

SKILLS: (Process Objectives)

8.101 - How to plan a menu for business luncheons and dinners.
8.102 - How to accept or refuse invitations (formal and informal).
8.103 - How to make reservations.
8.104 - How to plan seating arrangements.
8.105 - How to plan a business reception.
8.106 - How to make a budget for business social events.

RELATED TECHNICAL INFORMATION:

- Forms for extending invitations.

SUGGESTED INSTRUCTIONAL TIME: 8.10, 5-7 hours.

Note: Additional time for practical work application is provided in Office Application - Tasks 8.11 through 8.19.

Required Performance Standards:

- Demonstrates ability to plan a business luncheon for the number of persons to be invited, to issue accurate invitations, and stay within authorized budget. (Requests guidance on employer's desires, makes reservations at desired luncheon location, plans meal with caterer and makes seating arrangement and issues invitations with who, what, where, when and why information. Cancels reservations for regrets; checks and approves luncheon bill for payment.)

SECRETARIAL SCIENCE
TEST ITEMS

BLOCK OR DIVISION NUMBER: 8.0 TITLE: Office Procedures (Office Practice)

8.01 Given a desk with normal secretarial equipment and items, the learner will arrange his work station to present a neat, orderly appearance.
Standard: Neat and orderly work station.

8.02 Given a variety of incoming and outgoing mail items, the learner will demonstrate his ability to process both incoming and outgoing mail, including letters and packages.
Standard: Must meet postal regulations for outgoing mail, sorts, opens, and routes official mail correctly.

8.031 Given a calendar, a list of callers and cancellations, the learner will prepare a calendar of appointments for one day.
Standard: 100% accuracy, neatness applies, lists appointments in time sequence, enters information on supervisor's calendar.

8.032 Given a telephone, note pad, and pencil, a student will write two telephone messages received over the telephone, and will forward it to another person.
Standards: 100% accuracy, neatness and legibility apply.

8.032 Given a telephone with direct dialing capability, telephone directory and the name of a firm or individual to be called that requires a long distance call, find the proper telephone number and place a direct dial call to the party desired.
Standard: Student demonstrates ability to use telephone directory and dials the desired number correctly, first time.

8.04 The learner given a typewriter, eraser, a list of items to be purchased and a list of items to be shipped, plus three purchase order forms, and three shipping order forms will type correctly three shipping orders for equipment and supplies, plus three purchase orders for items of office supplies and equipment from three different suppliers.
Standard: 100% accuracy in items and information listed, neatness and organization apply; uses proper forms and makes legible carbon copies.

8.05 Given a set of prepared inventory cards, blank inventory cards, and equipment in the immediate office, the student will verify the accuracy of the inventory cards and make necessary changes.
Standard: 100% accuracy, new cards neat and legible.

8.06 Given a list of petty cash vouchers, the learner will sort, summarize, and replenish the petty cash fund.
Standard: 90% accuracy in calculations, entries neat and legible, following required procedures in proper sequence.

8.07 None.

8.08 Given a receptionist assignment, work station and situation calling for action, the learner will demonstrate his ability to perform receptionist duties.
Standards: Meet acceptable standards of personality, courtesy, poise, speaks clearly, gets names accurately, and gives accurate directions. (Teacher evaluation.)

8.09 Given supervisory responsibilities, the learner will supervise a classroom or other work activity situation for one class period.
Standards: (Teacher acceptance) maintains order, assigns tasks fairly, requires high performance standards, keeps accurate, organized legible records.

8.10 Given a requirement to arrange a business luncheon with necessary information, the learner will plan and make necessary arrangements for the luncheon.
Standard: 90% accuracy in planning a balanced light luncheon, determines location, the guest list and special considerations, prepares place cards, plans seating arrangement, informs caterer or eating establishment of requirements and time, issues invitations to guests.

ARTICULATION RESEARCH PROJECT

Secretarial Science (Stenographer and Executive Secretary)

Block 8.0 - Office Procedures (Office Occupations or Simulated Office Training)

This portion of the block serves several purposes. In the high schools approximately 90 to 120 hours are normally devoted to initial instruction and practical work in Personal Development (1.0), Filing (2.5), Business Machines [Calculating] (3.0), Business Machines [Reproduction] (4.0 The balance of the time allocated is used to provide the student with practical work application, in a simulated office environment, for all occupational courses taught in the articulated business education programs. James Sprunt Institute on the other hand uses 8 hours per week of the time allocated to this block to provide the secretarial students with actual work experience outside of the classroom, with the opportunity for practical application of skills and knowledges previously learned.

TASK LISTING AND INSTRUCTIONAL OBJECTIVES GUIDE

Task

8.11 - Practice Personal Development

Instructional Objective: 8.11 - Apply appropriate practices of personal development in an office environment. (Where appropriate, the student will be provided the necessary instruction based upon Block 1.0, prior to practical work phase.) See Note (2).

Process Objective: See Block 1.0 - Personal Development

Related Technical Information: See Block 1.0 - Personal Development

Standards: Performance to Business Office Standards

8.12 - Perform Typing Requirements

Instructional Objective: 8.12 - Student will be given opportunity to perform various real typing tasks for different persons, in an office environment and produce mailable copy. See Note (1).

Process Objective: See Block 2.0 and 5.0 - Typing

Related Technical Information: See Block 2.0 and 5.0 - Typing

Standards: See Block 2.0 and 5.0 - Typing

Task

8.13 - Perform Filing Tasks

Instructional Objective: 8.13 - Student will be given opportunity to perform a variety of real filing tasks, as required, in a school or other office, or a simulated office environment. (Where appropriate the student will be provided the necessary instruction on Filing procedures based upon Block 2.5, prior to the practice work phase.) See Note (2).

Process Objectives: See Block 2.5 - Records Management

Related Technical Information: See Block 2.5 - Records Management

Standards: See Block 2.5 - Records Management

8.14 - Use Business Machines [Calculating] to Perform Required Mathematical Tasks

Instructional Objective: 8.14 - Student will be given opportunity to acquire additional skill with business machines [calculating], by performing a variety of real mathematical tasks with the machines, in a school or other office, or a simulated office environment. (Where appropriate the student will be provided instruction based upon objectives specified in Block 3.0, prior to the practical work phase.) See Note (2).

Process Objective: See Block 3.0 - Business Machines [Calculating]

Related Technical Information: See Block 3.0 - Business Machines [Calculating]

8.15 - Operate Business Machines [Reproduction and Projection]

Instructional Objective: 8.15 - Provide student with opportunity to operate a variety of business machines, as required to satisfy real local needs, in a school, office or simulated office environment. (Where appropriate the student will be provided instruction based upon the objectives in Block 4.0, prior to the practical work phase.) See Note (2).

Process Objective: See Block 4.0 - Business Machines [Reproduction and Projection]

Related Technical Information: See Block 4.0 - Business Machines [Reproduction and Projection]

Standards: See Block 4.0 - Business Machines [Reproduction and Projection]

8.16 - Take Dictation Using Shorthand

Instructional Objective: 8.16 - Provide student with opportunity to take dictation from various persons or media, by shorthand and transcribe notes to produce mailable copy; in a simulated office environment. See Note (1).

Process Objective: See Block 6.0 - Shorthand

Related Technical Information: See Block 6.0 - Shorthand

Standards: See Block 6.0 - Shorthand

Task

8.17 - Perform Basic Accounting Tasks

Instructional Objective: 8.17 - Provide student with opportunity to perform a variety of basic real accounting tasks in a school office or simulated office environment. See Note (1).

Process Objective: See Block 7.0 - Accounting

Related Technical Information: See Block 7.0 - Accounting

Standards: See Block 7.0 - Accounting

8.18 - Perform office duties.

Instructional Objective: 8.18 - Provide the student with opportunities to perform a variety of real office duties under a variety of circumstances in a school, office or simulated office environment. (Where appropriate the student will be provided instruction based upon the objectives in Block 8.0, prior to the practical work phase.) See Note (2).

Process Objective: See Block 8.0 - Office Duties.

Related Technical Information: See Block 8.0 - Office Duties.

Standards: See Block 8.0 - Office Duties.

8.19 - Work With Machine Processed Data

Instructional Objective: 8.19 - Student will be given opportunity to prepare raw input information for Data Processing and to use machine processed information in a real or simulated business office environment. (James Sprunt only).

NOTES:

(1) Time allocations to various instructional objectives, not including specific blocks of instruction, will be determined by the instructor, based upon complexity of task, student progress and performance and the need for practical work in the Instructional Objective.

(2) The instructional time allocations given the instructional blocks that are conducted within "Office Practice" in the high schools are considered as part of the total hours allocated to Office Practice. To ensure an articulated program, instructional time devoted to a specific block of instruction should not be less than the total suggested for that block.

ARTICULATION RESEARCH PROJECT
INSTRUCTIONAL GUIDE

PROGRAM: This course of instruction is applicable to: Executive Secretary (DCC T-030), Accounting (DCC T-016), Business Administration (DCC T-018), High Schools - Stenographer/Business Education

COURSE: Data Processing (Concepts & Controls) (Block 9.0)

COURSE DESCRIPTION: Department of Public Instruction 6421
Introduction to Data Processing
Department of Community Colleges EDP 104
Introduction to Data Processing (Concepts & Controls)

INSTRUCTIONAL HOURS: High Schools: If taught, 33 hours.
CC/TI: 33 hours.

INSTRUCTIONAL OBJECTIVES:

To provide the learner with a working knowledge of the basic theory of data processing, how to work with computer concepts, how to perform data batch control, how to perform processed data control, and how to use processed data.

JOB QUALIFICATIONS:

Successful completion of this course does not in itself result in a specific job qualification. The primary purpose is to provide the learner with the capability to prepare information for machine processing and to use information processed, while working in a variety of business related occupations. This block of instruction is considered essential for any secretary who works in a small office where responsibilities may include handling accounts receivable and payable records, payrolls and inventories that are machine processed. The average accountant will have similar needs.

PREREQUISITES: High Schools: None
CC/TI: None

PERFORMANCE EVALUATION: See test items attached.

EQUIPMENT: See attached equipment list.

Note: The instruction in this block can be appropriately integrated into Block 7.0 (Basic Accounting) in the application of machine processed data to working with accounts receivable and payable, payrolls and inventories. If covered during such instruction, the student should not be required to repeat as a separate course.

BLOCK OR DIVISION NUMBER: 9.0 TITLE: Data Processing (Concepts & Control)

TASK NUMBER: 9.01 TITLE: Know Computer Concepts.

INSTRUCTIONAL OBJECTIVE - 9.01: How to Work With Computer Concepts.

SKILLS: (Process Objectives)

How to:

9.011 - Identify basic data processing machines.
9.012 - Work with data entry.
9.013 - Construct a basic program flow chart.
9.014 - Construct a basic systems flow chart.

RELATED TECHNICAL INFORMATION:

- Uses and capabilities of each machine.
- Definition of fields, rows, columns, etc.
- Symbols used in machine processed data.
- Computer information processes.

SUGGESTED INSTRUCTIONAL TIME: 9.01, 14 hours.

REQUIRED PERFORMANCE STANDARDS:

- Learner demonstrates ability to define and identify symbols used in machine processed data and fields,rows, columns, etc.
- Learner demonstrates knowledge and status of information entered into computer and the controls on data entered.
- Learner demonstrates knowledge of what types of information goes into the computer.
- Learner demonstrates knowledge of what the computer does to information entered.
- Learner demonstrates the ability to control data that comes out of the computer.
- Learner demonstrates ability to check the accuracy of data, can draw a program flow chart and follow through.
- Learner demonstrates knowledge of computer concepts and can do basic systems flow charts for most common jobs.

BLOCK OR DIVISION NUMBER: 9.0 TITLE: Data Processing (Concepts and Control).

TASK NUMBER: 9.02 TITLE: Perform Data Batch Control.

INSTRUCTIONAL OBJECTIVE - 9.02: How to Perform Data Batch Control.

SKILLS: (Process Objectives)

How to:

9.021 - How to perform data batch control.
9.022 - How to identify check points for computer operators to establish control.

RELATED TECHNICAL INFORMATION:

- Definition of check points for computer operators to establish control.

SUGGESTED INSTRUCTIONAL TIME: 9.02, 10 hours.

REQUIRED PERFORMANCE STANDARDS:

- Learner can devise a test to determine accuracy of data flow.
- Learner can post current data information and determine new control balances.

BLOCK OR DIVISION NUMBER: 9.0 TITLE: Data Processing (Concepts and Controls)

TASK NUMBER: 9.03 TITLE: Perform Processed Data Control.

INSTRUCTIONAL OBJECTIVE - 9.03: How to Perform Processed Data Control.

SKILLS: (Process Objectives)

9.031 - How to perform processed data control.

RELATED TECHNICAL INFORMATION:

- Definition of check points for computer operators to establish control.

SUGGESTED INSTRUCTIONAL TIME: 9:03: 5 hours. Testing: 4 hours.

REQUIRED PERFORMANCE STANDARDS:

- Learner can devise a test to determine the accuracy of data flow.
- Learner can post data flow and determine new balances.

TEST ITEMS

9.01 Given a list of data processing machines the student will identify the use of each, verbally or by other means as directed.
Standard: 100% accuracy in acceptable time limits as determined by problem complexity.

9.01 Given a problem in data flow the student will construct a flow chart using the correct flow chart symbols and explain in writing the reason for each step identified.
Standard: 100% accuracy within acceptable time limits as determined by problem complexity.

9.01 Given a problem to process through a computer, the student will construct a flow chart using the correct symbolism and label each step appropriately.
Standard: 100% accuracy in acceptable time limits as determined by problem complexity.

9.02 Given a set of problems or a group of figures or other data the student will use an adding machine to prepare a control tape for batch control.
Standard: 100% accuracy in acceptable time limits as determined by problem complexity.

9.03 Given a set of data processed by a computer the student will correctly identify any variances between data processed and outside control figures.
Standard: 100% accuracy in acceptable time limits as determined by problem complexity.

EQUIPMENT LIST

9.01 Observe card punch, verifier, sorter, collator, and computer on a field trip.

9.02 Adding machine.

9.03 Adding machine.

ARTICULATION RESEARCH PROJECT
INSTRUCTIONAL GUIDE

PROGRAM: Secretarial Science, Executive Secretary (DCC-T-030)

COURSE: Machine Transcription - Block 10.0

COURSE DESCRIPTION: Department of Public Instruction (Introductory Only): No course number.
Department of Community Colleges: Transcription Machines - BUS 210.

RECOMMENDED INSTRUCTIONAL HOURS: High Schools - 10
CC/TI - 33 to 55

INSTRUCTIONAL OBJECTIVES:

1. To provide the learner with the competencies to correctly operate and use transcription machines to include operator care required by manufacturer.

2. To provide the learner with the competencies and practice to transcribe copy correctly and rapidly from transcription machines.

3. To provide the learner with competencies required to transcribe and produce a mailable copy with the typewriter from transcription machines within acceptable time limits.

4. To provide the learner with the ability to make a transcription correctly and accurately.

JOB QUALIFICATIONS:

Those students who successfully complete 33 or more hours of this block of instruction plus the block pertaining to Personal Development, Records Management, Business Machines (Reproduction and Projection) and Typewriting are qualified as clerk-typists and can also perform adequately in a word processing center.

PREREQUISITES: Basic Typewriting (Block 2.0) Typewriting I or BUS 102 and 103

PERFORMANCE EVALUATION: By performance testing to determine and verify student occupational competencies and ability to meet occupational performance standards. See standardized test items at end of this block.

EQUIPMENT: See equipment list attached.

BLOCK OR DIVISION NUMBER: 10.0 TITLE: Machine Transcription.

TASK NUMBER: 10.01 TITLE: Operate Transcription Machines.

INSTRUCTIONAL OBJECTIVE - 10.01: How to Operate Transcription Machines.

SKILLS: (Process Objective)

How to:

10.011 - Set up transcription machine.
10.012 - Turn machine on.
10.013 - Operate foot pedal.
10.014 - Use head set.
10.015 - Insert and remove cassette or tape.
10.016 - Stop, start, and repeat.
10.017 - Disconnect and store.

RELATED TECHNICAL INFORMATION:

- Manufacturer's instructions.
- Nomenclature of operational components.

SUGGRSTED INSTRUCTIONAL TIME: 10.01, 2 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student demonstrates ability to operate transcription machine according to manufacturer's instructions.
- Student can identify and state purpose of primary operating controls.

BLOCK OR DIVISION NUMBER: 10.0 TITLE: Machine Transcription (continued)

TASK NUMBER: 10.02 TITLE: Perform Operator Care of Transcription Machine and Machine Transcriptions.

INSTRUCTIONAL OBJECTIVE - 10.02: How to Perform Operator Care of Transcription Machines and Machine Transcriptions.

SKILLS: (Process Objectives)

How to:

10.021 - Perform operator care and maintenance of transcription machine.
10.022 - Handle and store transcription machine cassettes or tapes.
10.023 - Correctly file machine transcribed material.

RELATED TECHNICAL INFORMATION:

- Manufacturer's instructions.
- Safety rules - electrical equipment.
- Filing procedures.

SUGGESTED INSTRUCTIONAL TIME: 10.02, 1 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student can perform required task according to manufacturer's specifications.
- Student demonstrates adequate knowledge of correct filing techniques.

BLOCK OR DIVISION NUMBER: 10.0 TITLE: Machine Transcription (continued)

TASK NUMBER: 10.03 TITLE: Produce Draft Documents of All Types Rapidly and Accurately from Machine Transcriptions.

INSTRUCTIONAL OBJECTIVE - 10.03: How to Produce Draft Documents of All Types Rapidly and Accurately from Machine Transcriptions.

SKILLS: (Process Objectives)

How to:

10.031 - Listen to machine transcriptions.
10.032 - Transcribe machine transcriptions directly to typewriter page in draft form, rapidly and accurately.
10.033 - Determine correct format for transcribed material.
10.034 - Achieve speed in transcription to typewritten page.

RELATED TECHNICAL INFORMATION:

- Machine operating instructions.
- Draft typing procedures.
- Business terminology.
- Standard formats for common types of written communications.
- Grammar and punctuation rules.
- Sentence and paragraph structure.
- Spelling and dictionary use.

SUGGESTED INSTRUCTIONAL TIME: 10.03, 5-15 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student can produce accurate draft document in correct format for type of communication rapidly in acceptable time limits.
- Prepares machine for future use.

BLOCK OR DIVISION NUMBER: 10.0 TITLE: Machine Transcription (Continued)

TASK NUMBER: 10.04 TITLE: Prepare Mailable Copy In Proper Format From Machine Transcriptions.

INSTRUCTIONAL OBJECTIVE - 10.04: How to Prepare Mailable Copy In Proper Format From Machine Transcriptions.

SKILLS: (Process Objectives)

How to:

10.041 - Transcribe to typewritten page accurately and in proper format from machine transcriptions.
10.042 - Edit typewritten material.

RELATED TECHNICAL INFORMATION:

- Machine operating procedures.
- Standard formats for common types of written communications.
- Word usage rules.
- Grammar and punctuation rules.
- Sentence and paragraph structure.
- Spelling and dictionary use.
- Business terminology.

SUGGESTED INSTRUCTIONAL TIME: 9.04, 2-12 hours.

REQUIRED PERFORMANCE STANDARDS:

- Produces mailable copy in acceptable time limits.
- Removes cassette or tape and prepares machine for further use.

BLOCK OR DIVISION NUMBER: 10.0 TITLE: Machine Transcription (Continued)

TASK NUMBER: 10.05 TITLE: Dictate Material for Machine Transcription Accurately and In proper Format.

INSTRUCTIONAL OBJECTIVE - 10.05: How to Dictate Material for Machine Transcription Accurately and In Proper Format.

SKILLS: (Process Objectives)

How to:

10.051 - Dictate for machine transcription.
10.052 - Make changes in transcription.

RELATED TECHNICAL INFORMATION:

- Machine operation.
- Word usage.
- Sentence and paragraph structure.
- Grammar and punctuation rules.
- Pronunciation rules.
- Business terminology.

SUGGESTED INSTRUCTIONAL TIME: 10.05, 1 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student transcription is clear, understandable, and accurately delivered in proper format.

TEST ITEMS

10.01 Given a transcription machine and proper tape or cassette, student will demonstrate ability to set up and operate machine to hear transcription.
Standard: Student follows manufacturer's instructions in machine operation and correctly identifies title of contents of transcription.

10.02 Given a transcription machine with a partially run tape or cassette, the student will demonstrate ability to return tape or cassette to start, prepare machine for storage and state how to properly store tape or cassette.
Standard: Follows manufacturer's instructions.

10.03 Given a transcription machine, transcribed material, typewriter, and required items the student will demonstrate ability to transcribe a rough draft of transcription at the typewriter rapidly and accurately.
Standard: Task performed in accepted time limits, proper format, observes correct grammar, spelling, sentence structure and punctuation rules.

10.04 Given transcription machine, a machine transcribed letter, typewriter and necessary material, the student will prepare mailable copy of the letter in accepted time limits.
Standard: Letter is a mailable copy.

10.05 Given transcription machine and blank tape or cassette and a short memorandum or letter, the student will dictate the material accurately in correct format and transcribe on the blank tape or cassette.
Standard: Material is accurately dictated in proper format, with words and instructions pronounced clearly and correctly.

TEST ITEMS

1 - Transcription machine per student with necessary cassettes or tapes.

1 - Typewriter per student.

1 - Overhead projector per class.

ARTICULATION RESEARCH PROJECT
INSTRUCTIONAL GUIDE

PROGRAM: Secretarial Science (Executive Secretary - DCC-T-030, Business Education - Stenographer: DPI)

COURSE (BLOCK): Word Processing (Block 11.0)

COURSE DESCRIPTION: Department of Public Instruction: Word Processing - Number 6422.
Department of Community Colleges: Word Processing - BUS 273.

RECOMMENDED INSTRUCTIONAL HOURS: High Schools - 90 to 180 hours (If taught)
CC/TI: 55 hours

INSTRUCTIONAL OBJECTIVES:

1. To provide the student with knowledge and experience regarding the word processing center concept of organization, operation and administration as employed in modern day major offices.
2. To provide the student with the opportunity to acquire and demonstrate good manipulative techniques on a power keyboard (automatic typewriter) and transcription machine.
3. To provide the student with the opportunity to produce documents from magnetic media rapidly and accurately, file, log and maintain such media.
4. To develop competencies to originate formats correctly, utilizing coding applicable to format.
5. To develop competencies to proofread and revise documents within acceptable time limits.
6. To develop competencies to plan individual work and meet required priorities.
7. To develop competencies required for the administration of a word processing center to include decision making and problem solving.
8. To refine competencies to utilize reference materials and solve common word processing problems rapidly and accurately.
9. To originate and dictate simultaneously in correct format from an outline for original document writing, documents that contain all essential information.

Note: Simulation or actual establishment of a word processing center is highly desirable for the achievement of instructional objectives of this block of instruction. To fully conduct the instruction peculiar to this block, an automatic typewriter should be available with priority to instructional class use. The bulk of instruction in this course should be application in nature.

RELATED GENERAL INFORMATION:

Word processing is a concept related to the rapid administration and production of finished written communications from the verbal or written word. This concept has been developed to more efficiently use personnel and equipment engaged in such activity in the modern office. Greater volume and more rapid production of high quality written material can result from the centralization of word processing personnel and equipment under one supervisor. Word processing centers make maximum use of automatic typewriters and transcription machines. Career patterns as administrative secretaries or production secretaries/ stenographers can result from word processing instruction.

JOB QUALIFICATIONS:

Successful completion of this instruction prepares the student for employment in a word processing center and additionally provides the secretary/stenographer candidate with reinforcement of administrative and supervisory competencies.

PREREQUISITES: Language Arts Skills, Advanced Typewriting (Block 5.0), Machine Transcription (Block 10.0), Office Procedures* (Block 8.0), Business Machines (Blocks 3.0 and 4.0), and Records Management (Block 2.5).

PERFORMANCE EVALUATION:

By performance testing to determine and verify student occupational competencies and ability to meet occupational performance standards. See standardized test items at the end of this block.

EQUIPMENT: See equipment list for this block.

*Note: May be taught concurrently with this block.

Credits: This block prepared with the assistance of Ms. Mary Helen Casey, Nash Technical Institute.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing

TASK NUMBER: 11.01 TITLE: Know Word Processing Terminology, Definitions and Usage.

INSTRUCTIONAL OBJECTIVE - 11.01: How to Learn Word Processing Terminology, Definitions and Usage.

SKILLS: (Process Objectives)

How to:

11.011 - Identify word processing terms.
11.012 - Spell word processing terms.
11.013 - Define word processing terms.
11.014 - Use word processing terms.

RELATED TECHNICAL INFORMATION:

- The word processing concept.

SUGGESTED INSTRUCTIONAL TIME: 11.01, 1 hours. (Suggested instructional time includes presentation, demonstration, application and examination phases of contact hours of instruction.)

REQUIRED PERFORMANCE STANDARDS:

- Student can identify, spell, and define word processing terms.
- Student can state briefly the concept of word processing.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing (continued)

TASK NUMBER: 11.02 TITLE: Know How Word Processing Concepts are Employed in Modern Offices.

INSTRUCTIONAL OBJECTIVE - 11.02: Learn How Word Processing Concepts are Employed in Modern Offices.

SKILLS: (Process Objectives)

N/A

RELATED TECHNICAL INFORMATION:

- Word processing concept.
- How word processing concepts are employed in the modern office.

SUGGESTED INSTRUCTIONAL TIME: 11.02, 1 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student can explain how word processing concepts are employed in the modern office to the satisfaction of the instructor.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing (continued)

TASK NUMBER: 11.03 TITLE: Communicate Orally.

INSTRUCTIONAL OBJECTIVE - 11.03: How to Communicate Orally.

SKILLS: (Process Objectives.

11.03 - How to communicate orally.

RELATED TECHNICAL INFORMATION:

- The art of oral communication.
- Grammar rules.
- Word usage.

SUGGESTED INSTRUCTIONAL TIME: 11.03, * hours.

*This instruction should be conducted concurrently with other appropriate block instructional objectives as well as in Blocks 1.0 and 8.0.

REQUIRED PERFORMANCE STANDARDS:

- Student uses correct grammar, proper words, enunciates and speaks clearly, observes brevity and communicates the desired message.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing

TASK NUMBER: 11.04 TITLE: Transcribe from Transcription Machines.

INSTRUCTIONAL OBJECTIVE - 11.04: How to Transcribe from Transcription Machines.

SKILLS: (Process Objectives)

This instructional objective includes no new skill development from that acquired in Block 10.0 (BUS 210). The primary purpose is to provide further experience in transcription from a machine since major use is made of such equipment in word processing.

RELATED TECHNICAL INFORMATION:

- The art of listening.
- Manufacturer's instructions.

SUGGESTED INSTRUCTIONAL TIME: 11.04, 4 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student is given a variety of machine transcribed communications to prepare as directed with emphasis upon transcription speed, accuracy, and production of mailable copy where appropriate.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing (continued)

TASK NUMBER: 11.05 TITLE: Proofread and Revise Documents.

INSTRUCTIONAL OBJECTIVE - 11.05: How to Proofread and Revise Documents.

SKILLS: (Process Objectives)

How to:

11.051 - Proofread.
11.052 - Revise documents.
11.053 - Prepare drafts.

Note: Repetition of instruction conducted in other blocks to provide further skill by application.

RELATED TECHNICAL INFORMATION:

- Proofreading marks.
- Grammar and punctuation rules.
- Sentence and paragraph structure.
- Word usage.
- Dictionary and reference manuals.
- Formats.

SUGGESTED INSTRUCTIONAL TIME: 11.05, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student can proofread and revise a rough draft document to achieve mailable copy or an improved new draft without changing the specifics and primary thought of the communication.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing

TASK NUMBER: 11.06 TITLE: Operate Automatic Typewriters (Power Keyboard)

INSTRUCTIONAL OBJECTIVE - 11.06: How to Operate Automatic Typewriters (Power Keyboard).

SKILLS: (Process Objectives)

How to:

11.061 - Operate automatic typewriters.
11.062 - Perform operator maintenance.
11.063 - Use and store magnetic media.

RELATED TECHNICAL INFORMATION:

- Manufacturer's instructions.
- Automatic typewriter capabilities.
- Magnetic media characteristics.

SUGGESTED INSTRUCTIONAL TIME: 11.06, 8 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student can produce mailable copy with automatic typewriter (power keyboard).
- Student can demonstrate the primary capabilities of the automatic typewriter (Power keyboard).

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing (continued)

TASK NUMBER: 11.07 TITLE: File, Log, and Maintain Magnetic Media.

INSTRUCTIONAL OBJECTIVE - 11.07: How to File, Log, and Maintain Magnetic Media.

SKILLS: (Process Objectives)

How to:

11.071 - Log magnetic media.
11.072 - File magnetic media.
11.073 - Maintain magnetic media.

RELATED TECHNICAL INFORMATION:

- Manufacturer's instructions.
- Magnetic media storage requirements.

SUGGESTED INSTRUCTIONAL TIME: 11.07, 1 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student can log and file magnetic media correctly according to established procedures.
- Student follows manufacturer's instructions correctly in magnetic media maintenance.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing (continued)

TASK NUMBER: 11.08 TITLE: Produce Documents from Magnetic Media.

INSTRUCTIONAL OBJECTIVE - 11.08: How to Produce Documents from Magnetic Media.

SKILLS: (Process Objectives)

How to:

1.081 - Operate power keyboard (automatic typewriter).
1.082 - Make changes, corrections and insertions on magnetic media.
1.083 - Produce documents from magnetic media.

RELATED TECHNICAL INFORMATION:

- Manufacturer's instructions.
- Proper care of magnetic media.

SUGGESTED INSTRUCTIONAL TIME: 11.08, 8 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student can produce mailable copy from magnetic media in acceptable time limits.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing (continued)

TASK NUMBER: 11.09 TITLE: Originate Document Formats and Use Applicable Coding.

INSTRUCTIONAL OBJECTIVE - 11.09: How to Originate Documents and Use Applicable Coding.

SKILLS: (Process Objectives)

How to:

11.091 - Originate documents.
11.092 - Determine applicable automatic typewriter coding for formats.
11.093 - Determine document format.

RELATED TECHNICAL INFORMATION:

- Automatic typewriter operating instructions.
- Document formats.
- Rules for written communication.
- Dictionaries and reference manuals.
- Business terminology.

SUGGESTED INSTRUCTIONAL TIME: 11.09, 6 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student can develop a document from minimum instructions and specifics that communicates the message and is a mailable copy in proper format.
- Student can determine proper format code and apply on machine.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing (continued)

TASK NUMBER: 11.10 TITLE: Dictate Documents Onto Magnetic Media from Printed or Handwritten Copy.

INSTRUCTIONAL OBJECTIVE - 11.10: How to Dictate Documents Onto Magnetic Media from Printed or Handwritten Copy.

SKILLS: (Process Objectives)

How to:

11.101 - Dictate on magnetic media.
11.102 - Prepare magnetic media for dictation.

RELATED TECHNICAL INFORMATION:

- Manufacturer's instructions for recording dictation on magnetic media.
- Rules of oral communication.

SUGGESTED INSTRUCTIONAL TIME: 11.10, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student can dictate assigned document accurately onto magnetic media from printed or handwritten copy which can be used.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing (continued)

TASK NUMBER: 11.11 TITLE: Use Reprographic Equipment.

INSTRUCTIONAL OBJECTIVE - 11.11: How to Use Reprographic Equipment.

SKILLS: (Process Objectives)

How to:

11.111 - Prepare machine for copy work.
11.112 - Prepare machine for making offset masters.

(A review of instruction Block 4.0, Business Machines-BUS 212.)

RELATED TECHNICAL INFORMATION:

- Manufac urer's instructions.
- Copy machine limitations
- Copy machine operating costs.

SUGGESTED INSTRUCTIONAL TIME: 11.11, 1 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student can make the desired number of mailable copies without wasting copier paper.
- Student can make an offset master that is usable.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing (continued)

TASK NUMBER: 11.12 TITLE: File and Maintain Records.

INSTRUCTIONAL OBJECTIVE - 11.12: How to File and Maintain Records.

SKILLS: (Process Objectives)

How to:

11.121 - Perform Records Management.

(This competency is a prerequisite to this block (course) of instruction - see Records Management, Block 2.5, DCC-BUS 112.)

RELATED TECHNICAL INFORMATION:

- Rules for developing records management systems.

SUGGESTED INSTRUCTIONAL TIME: 11.12, 0 hours.
(Task may be reviewed during practical work involving other appropriate instruction.)

REQUIRED PERFORMANCE STANDARDS:

- Student can file and maintain records accurately and correctly.
- Student can retrieve desired record from files with minimum delay.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing (Continued)

TASK NUMBER: 11.13 TITLE: Originate and Dictate Simultaneously From An Outline Documents That Contain Essential Information.

INSTRUCTIONAL OBJECTIVE - 11.13: How to Originate and Dictate Simultaneously From an Outline Documents That Contain Essential Information.

SKILLS: (Process Objectives)

How to:

11.131 - Originate documents from an outline.
11.132 - Dictate documents simultaneously with origination.
11.133 - Determine document format.
11.134 - Prepare machine for dictation.

RELATED TECHNICAL INFORMATION:

- Equipment manufacturer's instructions.
- Document formats.
- Dictation rules.
- Grammar and sentence structure rules.
- Punctuation rules.
- Oral communication.
- Word usage.

SUGGESTED INSTRUCTIONAL TIME: 11.13, 6 hours.

REQUIRED PERFORMANCE STANDARDS:

- Given an outline, the student can originate and dictate simultaneously a document that contains essential information in correct format.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing (continued)

TASK NUMBER: 11.14 TITLE: Make Decisions and Solve Problems.

INSTRUCTIONAL OBJECTIVE - 11.14: How to Make Decisions and Solve Problems.

SKILLS: (Process Objectives)

How to:

11.141 - Make decisions.
11.142 - Solve problems.

RELATED TECHNICAL INFORMATION:

- Oral communication techniques.
- The decision making process.
- The problem solving process.

SUGGESTED INSTRUCTIONAL TIME: 11.14, 2 hours.
(This can relate to only the introduction to the acquisition of these skills.)

REQUIRED PERFORMANCE STANDARDS:

- Student can communicate the primary elements pertaining to decision making and problem solving.
- Given a problem, the student demonstrates problem solving skills.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing (continued)

TASK NUMBER: 11.15 TITLE: Manage Own Time and Tasks, Determine Task Priorities.

INSTRUCTIONAL OBJECTIVE - 11.15: How to Manage Own Time and Tasks, Determine Task Priorities.

SKILLS: (Process Objectives)

How to:

11.151 - Plan daily work schedule.
11.152 - Plan task accomplishment.
11.153 - Determine assigned task priorities.

RELATED TECHNICAL INFORMATION:

- Scheduling techniques.
- Planning techniques.

SUGGESTED INSTRUCTIONAL TIME: 11.15, 1 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student can prepare a work schedule for an eight hour day based upon assigned tasks.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing (continued)

TASK NUMBER: 11.16 TITLE: Implement Procedures and Interpret Flow of Work Within Designated Controls.

INSTRUCTIONAL OBJECTIVE - 11.16: How to Implement Procedures and Interpret Flow of Work Within Designated Controls.

SKILLS: (Process Objectives)

How to:

11.161 - Interpret work flow.
11.162 - Plan work flow chart.
11.163 - Make work schedules.
11.164 - Implement procedural guidance and directives.

RELATED TECHNICAL INFORMATION:

- Organization techniques.
- Planning techniques.
- Scheduling techniques.
- Organizational policies and procedures.

SUGGESTED INSTRUCTIONAL TIME: 11.16, 2 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student can develop a valid work flow chart based upon stated work flow, procedural guidance and given work processing organization.

BLOCK OR DIVISION NUMBER: 11.0 TITLE: Word Processing (continued)

TASK NUMBER: 11.17 TITLE: Supervise Word Processing Center.

INSTRUCTIONAL OBJECTIVE - 11.17: How to Supervise Word Processing Center.

SKILLS: (Process Objectives)

How to:

11.171 - Plan work assignments.
11.172 - Prepare job descriptions.
11.173 - Utilize work flow charts.
11.174 - Implement procedural directives.
11.175 - Exercise supervisory responsibilities.

RELATED TECHNICAL INFORMATION:

- Management and supervision techniques.
- Planning techniques.
- Supply and equipment procedures.
- Organizational techniques.

SUGGESTED INSTRUCTIONAL TIME: 11.17, 2 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student can state the basic principles of supervision.
- Student demonstrates adequate competencies as supervisor when given assignment.

TEST ITEMS

11.01 Given a list of 40 terms, 15 of which are related to word processing and have spelling errors, demonstrate the ability to correctly identify, spell, and define those 15 related to word processing.
Standard: 80% accuracy.

11.02 Given a hypothetical traditional office situation, demonstrate a conceptual knowledge of the structuring of a word processing system by devising a plan, to the satisfaction of the instructor, to convert the traditional office to a word processing structured system.
Standard: Plan appears to implement concept and is workable.

11.02
a. List from memory five personality traits of a correspondence and/or administrative assistant.
b. Write a job description for a correspondence assistant, administrative assistant, word processing supervisor, and principal in a word processing environment.
c. Given a list of job titles, construct a word processing organizational chart.

Standard: Student demonstrates an adequately accurate knowledge of word processing center functions and personnel responsibilities.

11.03 While being observed by the teacher using a criterion sheet and with no forewarning and given a simulated or real office situation involved with answering a telephone and greeting persons, exhibit acceptable oral communication skills. During class sessions, exhibit desirable interpersonal communication skills consistently.
Standard: Student exhibits ability to be concise, clear, uses correct grammar and word usage, enunciates correctly, and is courteous and self-assured.

11.04 Given a power typewriter, a transcriber, and a tape, demonstrate good manipulative techniques while keyboarding dictated documents from prerecorded media within the line count production requirements.
Standard: Demonstrates good manipulative techniques and produces desired magnetic media within acceptable time limits.

11.04 & 11.09 Given two dictated tapes to be transcribed, a letter reference number and 12 sections of variables, two handwritten pages from which is needed a draft copy, and a table of specifications, demonstrate the ability to produce documents with the finished, correct products returned to the originators within a minimum of turnaround time.
Standards: Performs directed tasks, produces mailable copy in accepted time limits.

11.05 Given a power typewriter and three prerecorded documents containing errors, demonstrate the ability to locate and correct errors by producing three error free playback documents.
Standards: Produces mailable copy in acceptable time limits.

TEST ITEMS
(Con't.)

11.06 Given a power typewriter and a document containing all numbers, symbols, alphabetic letters, and applications requiring use of all codes, demonstrate good manipulative techniques while recording, correcting errors, and playing back copy.
Standards: Produces mailable copy in acceptable time limits while demonstrating good manipulative techniques.

11.07 & 11.12 Given 16 standard paragraphs and 3 documents to be prepared for permanent storage, demonstrate the ability to record and prepare applicable reference sheets accurately.
Standard: Follows correct records management and logging procedures.

11.07 & 11.12
a. Given a completed log sheet with 10 documents specified and 10 minutes, locate the 10 documents in storage.
Standard: 100% accuracy in acceptable time limits.
b. Given a sheet containing 20 standard paragraphs, prepare an applicable reference sheet accurately.
Standard: 100% accuracy.

11.08 Given a power typewriter and three prerecorded documents containing revisions marked with proofreaders' notations, demonstrate the ability to revise prerecorded documents by making the necessary revisions correctly during play back.
Standard: Produces mailable copy in acceptable time limits.

11.09 See Test Item 11.04.

11.09 Given a document to be formatted, demonstrate judgmental skills to determine type of format to the satisfaction of the instructor; then record the document accurately.
Standard: Performs task correctly and uses good judgment.

11.10 Given dictating equipment, a tape, and a document, demonstrate correct dictating procedures by dictating the document accurately.
Standard: Tape playback permits production of a mailable copy.

11.11 Given reprographic equipment and a document, apply one method of producing multiple copies rapidly and accurately.
Standard: Produces mailable copy from equipment used.

11.12 Given an in-basket and 25 business papers and an answer sheet, indicate in which department and where each business paper should be filed by filling in the answer sheet correctly.
Standards: At least 80% filing accuracy.

11.12 See Test Item 11.07.

TEST ITEMS
(Con't.)

11.13 Given dictating equipment, a tape, a letter to be answered, and an outline for original document writing, demonstrate original dictation procedures by completing the outline for original document writing from the letter to be answered, then compose and dictate the answer, containing all essential information, in correct format.
Standard: Produces mailable copy in acceptable time limits by process directed.

11.14 After having worked in a simulated or real word processing system for no less than 2 weeks time and given 10 situations that require decision making and problem solving abilities, analyze each situation in writing and reach an acceptable solution for each situation.
Standard: Solves problems correctly and makes an adequate workable decision for 8 out of 10 situations.

11.15 After having worked in a simulated or real word processing system for no less than 2 weeks time and given twelve document production tasks, some similar and some dissimilar, analyze each task and determine the quickest method for performing each task or group of related tasks to the instructor's standard for approval.
Standard: Proposed actions are workable and most efficient.

11.15 Given an in-basket of rush requests, revisions, and routine work assignments, a written description of the word processing system situation, and 15 minutes, assess the priorities, listing all high priority work first and other work in descending order of priority according to guidelines given in written description.
Standard: Student assesses priorities correctly with at least 80% accuracy.

11.16 Given a hypothetical situation in a word processing system where problems have been encountered, assess the situation and recommend two suitable solutions, including changes and improvements to be implemented and interpreting the flow of procedures after the changes are implemented.
Standard: Proposed solutions workable and effective for situation; developed in acceptable time limits.

11.17 Given 20 tasks related to secretarial and clerical support and an analysis sheet, demonstrate the ability to handle each task effectively by describing on the analysis sheet the steps in the performance of each task.
Standard: At leat 80% of tasks handled effectively.

11.17 During class sessions and given a simulated or real word processing system, demonstrate the ability to supervise the center to the instructor's approval.
Standard: Student plans and maintains even work flow according priorities established, is knowledgable of center activities, maintains adequate records, documents produced are a mailable copy.

EQUIPMENT LIST

(Class - 12 Students)

1. Transcription machine - 1 per student.
2. Automatic Typewriter - 2 per class.
3. Transparency projector - 1 per class.
4. Necessary tapes and cassettes to support above transcription machines.
5. Magnetic media for automatic typewriters.
6. Typewriter - 1 per student.

ARTICULATION RESEARCH PROJECT

INSTRUCTIONAL OBJECTIVE GUIDE

PROGRAM: Business Administration (DCC T-018)
Accounting (DCC T-016) Secretarial Science (DCC T-030)

COURSE: Office Management (Block 14.0)- Business Administration
(Block 10.0)- Accounting

COURSE IDENTIFICATION: Department of Public Instruction -
Not taught in high schools.

Department of Community Colleges -
BUS 271

INSTRUCTIONAL TIME: 55 hours

INSTRUCTIONAL OBJECTIVES:

To provide the learner with the necessary information and procedures required for satisfactory performance of the common duties of an office manager of a medium-sized industrial or commercial activity.

JOB QUALIFICATION:

For the learner with managerial aptitudes; successful completion of this block of instruction provides the necessary basic information and skill training which, if followed by a limited period of supervised on-the-job training, will qualify the individual to perform as an administrative office manager.

PREREQUISITES:

None.

PERFORMANCE EVALUATION:

Performance evaluation will be based upon the performance standards shown for each instructional objective, employing the test items attached.

EQUIPMENT REQUIREMENTS:

Access to standard First Aid Kits.

ARTICULATION RESEARCH PROJECT
OCCUPATIONAL TASKS AND INSTRUCTIONAL REQUIREMENTS

Business Administration

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management

TASK NUMBER: 14.01 TITLE: First Aid (Dispensary).

INSTRUCTIONAL OBJECTIVE - 14.01: How to Administer First Aid.

SKILLS: (Process Objectives)

14.011 - How to perform basic first aid practices.
14.012 - How to identify and use standard first aid equipment.

RELATED TECHNICAL INFORMATION:

- Proper first aid procedures to follow regarding cuts, burns, gas inhalation, fractures, epilepsy, heart attacks, or any other unscheduled illness.
- Required first aid equipment.

Required Instructional Time: 14.01, 5 hours.

Required Performance Standards:

- Selects proper first aid procedure for emergency condition.
- Performs or describes steps of first aid procedure correctly and in proper sequence.
- Selects first aid items required and uses correctly.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.02 TITLE: Plan and Supervise Safety Rules and Compliance.

INSTRUCTIONAL OBJECTIVE - 14.02: How to Plan and Supervise Safety Rules and Compliance.

SKILLS: (Process Objectives)

14.021 - How to identify safety hazards.
14.022 - How to prevent common safety hazards.
14.023 - How to make a fire evacuation plan.
14.024 - How to use fire extinguishers.

RELATED TECHNICAL INFORMATION:

- Electrical overloads/hazards.
- Office arrangement.
- Floor surface dangers.
- Poor lighting.
- Other danger practices.
- Fire prevention and fire fighting.

Required Instructional Time: 14.02, 4 hours.

Related General Information:

The importance of observation of occupational safety, safety in the home and traffic safety practices to the employee, employer and the community.

Required Performance Standards:

- Develops reasonable and workable safety plan, appropriate for activity and hazards possible.
- Provides for implementation and supervision of safety rules, fixes responsibilities.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.03 TITLE: Plan and Supervise Motor Vehicle Parking Areas and Grounds.

INSTRUCTIONAL OBJECTIVE - 14.03: How to Plan and Supervise Motor Vehicle Parking Areas and Grounds.

SKILLS: (Process Objectives)

14.031 - How to plan vehicle parking area layout.
14.032 - How to develop and draw traffic flow charts.

RELATED TECHNICAL INFORMATION:

- Vehicle parking space requirements.
- Visitor requirements.
- Handicapped employees' problems.
- Traffic flow requirements.
- Entrance and exit considerations from/to public roads and streets.

Required Instructional Time: 14.03, 2 hours.

Required Performance Standards:

- Plan provides for visitors and the handicapped.
- Plan considers primary problem areas.
- Plan allows maximum use of available space, with sufficient maneuver room.
- Plan permits easy flow of traffic, avoids bottle necks, has directional signs where needed.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.04 TITLE: Supervise Visitor Reception and Information.

INSTRUCTIONAL OBJECTIVE - 14.04: How to Supervise Visitor Reception and Information.

SKILLS: (Process Objectives)

14.041 - How to apply supervision principles.
14.042 - How to plan and conduct visitor tour programs.
14.043 - How to plan for visitor reception and information requirements.

RELATED TECHNICAL INFORMATION:

- What constitutes the company visitor policies.
- Purpose of plant visitor programs.
- Know standard business practices for receiving visitors.

Required Instructional Time: 14.04, 2 hours.

Required Performance Standards:

- Visitor reception plan considers the needs of visitor and is within resources and needs of activity.
- Plan contributes to good public relations.
- Plan considers possible health and safety hazards to visitors.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.05 TITLE: Supervise Mail Room and Message Center.

INSTRUCTIONAL OBJECTIVE - 14.05: How to Supervise Mail Room and Message Center.

SKILLS: (Process Objectives)

14.051 - How to plan a mail and inter-office message distribution system.

RELATED TECHNICAL INFORMATION:

- Mail and package delivery systems.
- Standard mail and message sorting and delivery procedures.
- Special mail and package handling procedures.

REQUIRED INSTRUCTIONAL TIME: 14.05, 3 hours.

REQUIRED PERFORMANCE STANDARDS:

- Plan expedites priority mail and message traffic and provides for security of sensitive items.
- Plan contributes to operational efficiency of office.
- Plan provides for security of mail, stamps, etc., and precludes unauthorized use of postage.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.06 TITLE: Supervise Cafeteria and/or Rest Facilities.

INSTRUCTIONAL OBJECTIVE - 14.06: How to Supervise Cafeteria and/or Rest Facilities.

SKILLS: (Process Objectives)

14.061 - How to determine the need for organizational food service and/or rest facilities.
14.062 - How to determine if food service facilities, equipment and personnel are meeting required sanitary practices.
14.063 - How to ensure that food service activities are providing satisfactory service.

RELATED TECHNICAL INFORMATION:

- Need for employee rest facilities.
- Advantages and disadvantages of organizational food service facilities.
- Advantages and disadvantages regarding the employment of contractors or caterers to provide food service needs.
- Proper food service sanitation practices.
- Fast food vs. full meal advantages and disadvantages.

REQUIRED INSTRUCTIONAL TIME: 14.06, 3 hours.

REQUIRED PERFORMANCE STANDARDS:

- Student can state the advantages and disadvantages of organizational food service facilities with 80% accuracy.
- Student can state public health rules for food service facilities.
- Student can state and demonstrate food service facility inspection requirements with 80% accuracy.
- Student can list the procedures for determining the need and type of service desirable for an organizational food service activity with 80% accuracy.
- Student can state an accepted procedure for ensuring a food service activity is providing satisfactory service.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.07 TITLE: Supervise Internal Transportation Services.

INSTRUCTIONAL OBJECTIVE - 14.07: How to Supervise Internal Transportation Services.

SKILLS: (Process Objectives)

14.071 - How to control organizational transportation.
14.072 - How to develop vehicle use policies and procedures.
14.073 - How to ensure proper care of vehicles.

RELATED TECHNICAL INFORMATION:

- Standard warranty requirements.
- Licensing requirements (vehicle and driver).
- Insurance requirements.
- Maintenance contracts.
- Rental contracts.
- Driver maintenance requirements.

Required Instructional Time: 14.07, 3 hours.

Required Performance Standards:

- Student can state or list recognized reasons, policies, and methods to control use of organizational vehicles.
- Student can prepare a valid program to ensure that organizational vehicles receive required periodic and daily maintenance.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.08 TITLE: Plan/Supervise Custodial, Facilities, Utilities Requirements/Activities.

INSTRUCTIONAL OBJECTIVE - 14.08: How to Plan/Supervise Custodial, Facilities, Utilities Requirements/Activities.

SKILLS: (Process Objectives)

14.081 - How to develop an external and internal decoration plan for buildings and grounds.
14.082 - How to develop a custodial plan for facilities and grounds.
14.083 - How to develop a utilities requirements and utilization plan.
14.084 - How to develop and use a facilities and utilities custodial maintenance and use check list.
14.085 - How to develop a maintenance of buildings and grounds budget.
14.086 - How to develop a utilities budget.

RELATED TECHNICAL INFORMATION:

- Landscaping of grounds considerations.
- Facility decorations (external and internal) considerations.
- Environmental control impact on operations and workers.
- Impact of lighting on production.
- Economy considerations in utility use.
- Maintenance of facilities, utilities and grounds requirements.
- Sanitation, health and safety considerations.
- Custodial requirements.

Required Instructional Time: 14.08, 5 hours.

Required Performance Standards:

- Student can state valid reasons to provide for internal and external beautification for a commercial facility and how it can be accomplished.
- Student can develop and justify a custodial plan for a given commercial facility.
- Student can state or list correctly the impact upon employee operational efficiency and health of environmental factors such as heat, cold, light, noise, dust, sanitation, safety hazards, etc.
- Student can list and justify valid methods of utility economy.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.09 TITLE: Ensure Maintenance of Office Equipment.

INSTRUCTIONAL OBJECTIVE - 14.09: How to Ensure Proper Maintenance of Office Equipment.

SKILLS: (Process Objectives)

14.091 - How to determine the requirements and method(s) of office equipment maintenance.
14.092 - How to establish an inspection and maintenance of equipment schedule.

RELATED GENERAL INFORMATION:

- Definition and purpose of preventive maintenance.
- Operator care of equipment considerations.
- Objectives of remedial maintenance.
- Purpose, advantages and disadvantages:
  a) Maintenance contracts
  b) Individual service calls
  c) Company service department
  d) Leasing of office equipment with maintenance contracts
- Equipment life and breakdown frequencies.
- Common causes of office equipment breakdown.
- Comparisons of preventive maintenance costs vs. remedial maintenance costs.

Required Instructional Time: 14.09, 3 hours.

Related General Information:

- The lease arrangements probability theory.

Required Performance Standards:

- Student can state or list the purpose and common procedures for preventive maintenance of office equipment.
- Student can state with 80% accuracy the advantages and disadvantages of contract maintenance of office equipment vs. in-house maintenance of same.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.10 TITLE: Perform Office Equipment Rental Requirements.

INSTRUCTIONAL OBJECTIVE - 14.10: How to Perform Office Equipment Rental Requirements.

SKILLS: (Process Objectives)

14.101 - How to determine which equipment should be rented.
14.102 - How to determine the proper leasing arrangement.
14.103 - How to negotiate the lease.

RELATED TECHNICAL INFORMATION:

- Advantages of leasing.
- Disadvantages of leasing.
- Purpose of short-term leases.
- Purpose of long-term leases with renewal options.
- Purpose of long-term leases with purchase options.
- Purpose of a sales leaseback arrangement.

Required Instructional Time: 14.10, 2 hours.

Required Performance Standards:

- Student can state or list advantages and/or disadvantages of office equipment rental contracts with 80% accuracy.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.11 TITLE: Supervise Office Supply Activities.

INSTRUCTIONAL OBJECTIVE - 14.11: How to Supervise Office Supply Activities.

SKILLS: (Process Objectives)

14.111 - How to determine best storeroom location.
14.112 - How to determine storage facility requirements.
14.113 - How to eliminate marginal stock items.
14.114 - How to arrange stock according to an efficient and orderly plan.
14.115 - How to determine maximum and minimum quantities required for each item stocked.
14.116 - How to develop procedures for issue of supplies to the users and establish a re-order point.
14.117 - How to determine work-load requirements, staffing, and functions of stock-room personnel.
14.118 - How to determine the costs of supplies issued to each business unit and inform supervisors by means of monthly reports.
14.119 - How to determine if less costly substitute items can be used.
14.1110- How to develop a supply budget.

RELATED TECHNICAL INFORMATION:

- Purpose of a re-order point.
- Factors in determining storeroom location.
- Factors in determining maximum and minimum quantities of supplies.
- Components of a supply requisition.
- Shelf life and storage requirements for various supply items.
- Supply ordering procedures.
- Supply economy.

Required Instructional Time: 14.11, 5 hours.

Required Performance Standards:

- Student can prepare correctly a supply order from an office supply catalogue for a given list of office supplies.
- Student can define or describe accurately marginal office supply stock items, impact on supply operations, and procedures required to purge the supply system.
- Student can develop and justify a workable supply control and issue plan for common office supplies.
- Student can describe procedures for developing an office supply budget.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.12 TITLE: Supervise Application Employee Conduct and Standards.

INSTRUCTIONAL OBJECTIVE - 14.12: How to Develop and Apply Employee Office Conduct Standards.

SKILLS: (Process Objectives)

14.121 - How to develop relevant standards for employee office conduct.
14.122 - How to disseminate information regarding emplovee office conduct standards.
14.123 - How to apply established office conduct standards.

RELATED TECHNICAL INFORMATION:

- Importance of office conduct standards.
- Importance that all employees are aware of office conduct standards.
- Consideration of union contracts where applicable.
- Consideration of applicable labor laws and regulations.

Required Instructional Time: 14.12, 2 hours.

Required Performance Standards:

- Student can state and justify the requirements for office conduct standards and the limitations on such standards.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.13 TITLE: Plan for Internal Communications Services.

INSTRUCTIONAL OBJECTIVE - 14.13: How to Plan Internal Office Communication Requirements.

SKILLS: (Process Objectives)

14.131 - How to determine internal communication requirements.
14.132 - How to choose an internal communication system(s).

RELATED TECHNICAL INFORMATION:

- Types of internal communication systems; with advantages and disadvantages:
  a) Messenger
  b) Telephone
  c) Intercommunication voice system
  d) Radio
  e) Tube conveyors
  f) Electronic transcription
  g) Close circuit TV

Required Instructional Time: 14.13, 3 hours.

Required Performance Standards:

- Office communication needs are efficiently met in any plan developed, that are within budget and maintenance capabilities or limitations.
- Control of unauthorized use is possible.
- Expansion of system can be accomplished without difficulty.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.14 TITLE: Plan and Make Work Flow Sheets.

INSTRUCTIONAL OBJECTIVE - 14.14: How to Plan and Make Work Flow Sheets.

SKILLS: (Process Objectives)

14.141 - How to determine the key document.
14.142 - How to trace the path of the key document through the office.
14.143 - How to express the path of the key document in the form of a work flow.

RELATED TECHNICAL INFORMATION:

- What is a key document?
- What is work flow?
- What type of work flow is most efficient?

Required Instructional Time: 14.14, 3 hours.

Required Performance Standards:

- Student can identify key document.
- Student can explain work flow concepts correctly.
- Student can develop and explain the path of the key document in the form of a work flow with at least 80% accuracy.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.15 TITLE: Plan Office Layout.

INSTRUCTIONAL OBJECTIVE - 14.15: How to Plan Office Layout.

SKILLS: (Process Objectives)

14.151 - How to determine the work flow in the office.
14.152 - How to arrange layout to match work flow applying basic layout guidelines.

RELATED TECHNICAL INFORMATION:

- The conventional department layout vs. the office landscape.
- Common layout considerations and guidelines, to include light, heat, ventilation, and ceiling.
- Models commonly used in determining the most efficient office layout.
- Common space guidelines for personnel.
- Common space guidelines for furniture and equipment.
- The modern open office or work center concept.
- Factors to be considered in locating specialized work centers.
- Privacy considerations for key personnel.
- Visitor reception area considerations.

Required Instructional Time: 14.15, 3 hours.

Required Performance Standards:

- Student can apply accepted work flow diagramming procedures.
- Proposed office layout sketch is workable, contributes to office efficiency, provides for smooth flow traffic, considers operations of primary activities and supervisory requirements.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.16 TITLE: Make Work Schedules.

INSTRUCTIONAL OBJECTIVE - 14.16: How to Make Work Schedules.

SKILLS: (Process Objectives)

14.161 - How to determine the extent to which the work can be scheduled.
14.162 - How to assign time values to each operation in the work sequence - when the operation starts and when it ends.
14.163 - How to determine the means of scheduling.
14.164 - How to construct P.E.R.T. charts.
14.165 - How to determine the critical path.
14.166 - How to plan and schedule overtime and weekend work schedules and select the worker(s).

RELATED TECHNICAL INFORMATION:

- The common practice in scheduling is to work backward from the completion date.
- The importance of scheduling.
- The means of scheduling.
- Definition and purpose of P.E.R.T.
- Definition and purpose of Critical Path Method.
- Considerations for overtime and weekend/holiday work requirements.

Required Instructional Time: 14.16, 3 hours.

Required Performance Standards:

- Work schedule prepared is comprehensive, includes consideration of personal as well as organizational factors and provides capability to meet workload.
- Student can apply PERT process correctly and select the critical path.

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management (cont'd.)

TASK NUMBER: 14.17 TITLE: Plan Office Organization and Staffing.

INSTRUCTIONAL OBJECTIVE 14.17: How to Plan Office Organization and Staffing.

SKILLS: (Process Objectives)

14.171 - How to apply management techniques to planning office organizational requirements.
14.172 - How to apply personnel management techniques to staffing an office organization.
14.173 - How to perform job analyses.

RELATED TECHNICAL INFORMATION:

- Review organizational planning techniques.
- Review personnel staffing requirements.
- Staffing guides.
- Dictionary of Occupational Titles (DOT)

Required Instructional Time: 14.17, 4 hours.

Required Performance Standards:

- Demonstrates ability to plan and justify an adequate office organization, given work flow, workloads and office operational activities.
- Demonstrates ability to use staffing guides in organizational planning and staffing.
- Recognizes and applies appropriate supervisory personnel for each internal requirement, where justified by span of control needs.
- Demonstrates ability to apply skill and grade requirements in staffing of organization.

TEST ITEMS

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management

14.01 The student will describe or demonstrate the proper first aid procedures to follow and the equipment needed to treat a common unscheduled illness or injury chosen by the instructor.
STANDARDS: -Proper first aid procedure selected for condition.
-Proper steps in sequence described or demonstrated.
-Selects and uses required first aid material correctly.

14.02 The student will devise and justify safety rules for a specified and common hazards local firm. The student will then list the actions that should be taken to insure compliance with these regulations.
STANDARDS: -Safety rules devised are appropriate for hazards and complete. Justification adequate.
-Compliance actions workable, appropriate and adequately justified.

14.03 The student will prepare a vehicle parking area layout and draw a traffic flow chart for employees of a local business firm, given size, shape, expected number of vehicles, and street egress of parking area.
STANDARDS: -Plan considers all primary problem areas, has maximum utilization of area, avoids cross traffic and choke points, provides adequate maneuver room.

14.04 The student will list the standard practices employed to provide for the reception of visitors by business/industry and will justify same.
STANDARDS: -Practices listed are relatively standard and use is well justified.

14.05 The student will study, analyze and critique the inter-office message distribution system of the institution which he is attending.
STANDARDS: -Includes all primary activities, analysis covers main areas of concern for inter-office distribution--critique well organized, identifies problem area and proposes workable solution.

14.06 The student will list the factors which should be considered in establishing and inspecting the company food service facilities.
STANDARDS: -Considerations should include need, facilities, equipment, health and sanitation, types of meals and preparation, worker food preferences, qualification of food service personnel, food purchasing and storage, inspection frequency, purpose of inspections, inspection techniques, & complaints.

14.07 Given a short case describing a firm, the student will develop vehicle use and maintenance policies and procedures. The student will list factors that should be considered in developing these policies.
STANDARDS: -Factors consider purpose and use limits of vehicles, vehicle control policies, operator controls, vehicle maintenance and security, with full justification for policies and procedures developed.

TEST ITEMS (cont'd.)

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management

14.08 The student will develop an external and internal beautification plan for the buildings and grounds of a local business firm.
STANDARDS: -Prepares plan with sketch--considers location, type of operation, condition and nature of facilities, fund limitations, purpose of plan, internal lighting and safety, external is in harmony with or upgrades surroundings, is practical, and improves firm image.

The student will develop a facilities maintenance budget for a firm described by the instructor.
STANDARDS: -Considers type and size of facilities, degree of maintenance required, nature of operation standards to be achieved, fund limitations, equipment requirements, and contract vs. in-house maintenance personnel.

The student will discuss the impact of proper lighting on production, given the type of operation involved.
STANDARDS: -Consideration given to type of work performed, degree of precision required, facilities and equipment involved, as a minimum.

14.09 The student will list the advantages and disadvantages of maintenance contracts.
STANDARDS: -Advantages and disadvantages listed are adequately justified as such and are considered valid. Equipment and personnel requirements and maintenance frequency considered.

The student will compare preventive maintenance vs. remedial maintenance costs.
STANDARDS: -Equipment and facility downtime and personnel lost time are considered in comparisons as are skill levels of personnel required to perform types of maintenance.

The student will list the conditions under which the company might wish to establish its own service department.
STANDARDS: -Consideration given to equipment density, size of facilities, type of operations in facilities, size and length of daily operations, frequency of maintenance requirements, sanitary requirements and number of custodial (maintenance) personnel required.

14.10 The student will discuss the advantages and disadvantages of leasing.
STANDARDS: -Factors considered are valid; obsolescence, replacement and maintenance are considered in discussion.

The student will explain the procedure involved in a sales leaseback arrangement.
STANDARDS: -Primary considerations are covered adequately and accurately. Student demonstrates ability to describe sales-leaseback arrangements.

TEST ITEMS (cont'd.)

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management

14.11 The student will explain the procedure used to eliminate marginal stock items.
STANDARDS: -Student can define or describe accurately marginal stock items and impact on supply operations.
-Procedure described to eliminate marginal stock items valid.

Given a description of a company's supply requirements and its financial resources, the student will develop a supply budget for a specified period of time.
STANDARDS: -Student uses supply catalogue correctly.
-Supply budget developed will meet the supply requirements for items used in period specified and remains in fund limits.

14.12 The student will explain the importance of office conduct standards.
STANDARDS: -Explanation is comprehensive, considers needs of employer, individual and work group and impact on production and morale.

The student will list the factors which should be considered in establishing employee conduct standards.
STANDARDS: -Individual rights not violated, yet the welfare of the group and the operation as a whole are considered. Factors considered are valid and justified.

14.13 The student will recommend an internal communication system for the institution at which the student is enrolled. The student will discuss the reasons behind his particular recommendation.
STANDARDS: -Needs, costs, operational and maintenance requirements are considered. Advantages justified as outweighing disadvantages.

14.14 The student will prepare a work flow sheet to trace the path of the key document through a local business firm.
STANDARDS: -Can identify the key document.
-Can explain and apply work flow concepts.
-Can develop and explain the path of the key document in the form of a work flow.

14.15 Given a description of the physical facilities, employees and a work flow diagram of a company, the student will plan an office layout for that company.
STANDARDS: -Student applies accepted work flow diagramming procedures, office layout is workable and adequately justified. Efficiency of operations and impact on personnel and span of control are considered.

14.16 The student will prepare a PERT chart of a project described by the instructor. The student will also determine the critical path for that project.
STANDARDS: -Student gives evidence of ability to apply PERT process, considered all factors given and selects critical path.

The student will prepare a work schedule for himself for the next week of school.
STANDARDS: -Work schedule is comprehensive and includes all factors concerned, appears valid when justified.

TEST ITEMS (cont'd.)

BLOCK OR DIVISION NUMBER: 14.0 TITLE: Office Management

14.17 Given a description of a task to be accomplished, the number of people available, the skills they possess, the cost constraints and the time available, the student will plan and staff a hypothetical organization to accomplish the task described.

STANDARDS: -Identifies overall activity function and task requirements.
-Organization is mission-oriented.
-Span of control in reasonable limits neither too much or too little.
-Valid staffing procedures used in determining the job level and pay scale for positions identified.
-Work flow considered.
-Organization and staffing plan adequately justified.

ARTICULATION RESEARCH PROJECT
INSTRUCTIONAL GUIDE

PROGRAM: Business Administration (DCC T-018); Accounting (DCC T-016)
Business and Office Education (SDPI); Secretarial Science (DCC T-030)

COURSE: Business Law (Block 12.0 - Accounting)
(Block 16.0 - Business Administration and Secretarial Science)

COURSE IDENTIFICATION: Department of Public Instruction - No. 7221 Business Law
Department of Community Colleges - BUS 115 and 116 -
Business Law I & II

INSTRUCTIONAL HOURS: High Schools - 90 hours (when taught)
CC/TI - 66 (Business Administration and Accounting)
33 (BUS 115 - Secretarial Science)

INSTRUCTIONAL OBJECTIVES:

To provide the student with the information to correctly define business law terminology and state involvement of business law in the following:

1. Courts and court procedures; Contracts, Sales, Bailments, and Commercial paper.
2. Agency and employment; Partnerships, Corporations, Risk-Bearing devices; and Property.

JOB QUALIFICATION:

Successful completion of this block of instruction does not in itself provide a specific job qualification, but when taken in combination with management and related business courses, the student will be qualified to perform as a management trainee, or as a junior accountant.

PREREQUISITES:

None.

PERFORMANCE STANDARDS:

Performance standards shown for each instructional objective will be applied. Occupational qualification or adequacy in this subject area will be determined by using the outline test items attached. Emphasis is placed upon applied performance evaluation, using the appropriate performance standards that are recognized by business and industry.

EQUIPMENT REQUIREMENTS:

None.

ARTICULATION RESEARCH PROJECT
OCCUPATIONAL TASKS AND INSTRUCTIONAL REQUIREMENTS

Accounting - Business Administration

BLOCK OR DIVISION NUMBER: 12.0 TITLE: Business Law - (Accounting)

16.0 TITLE: Business Law - (Business Administration)

TASK NUMBER: 12.01 & 16.01 TITLE: Know Basic Principles of Law and Its Enforcement.

INSTRUCTIONAL OBJECTIVE - 12.01 & 16.01: Learn Basic Principles of Law And Its Enforcement.

SKILLS: (Process Objectives)

None.

RELATED TECHNICAL INFORMATION:

- Basic principles and definitions of law.
- Courts and court procedures.

REQUIRED INSTRUCTIONAL TIME: 12.01 & 16.01, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

- The student will state the basic definition of law. 100% accuracy.
- The student will explain the levels or classification of the courts in our court system. 80% accuracy.

ARTICULATION RESEARCH PROJECT
OCCUPATIONAL TASKS AND INSTRUCTIONAL REQUIREMENTS

Accounting - Business Administration

BLOCK OR DIVISION NUMBER: 12.0 TITLE: Business Law - (Accounting)

16.0 TITLE: Business Law - (Business Administration)

TASK NUMBER: 12.01 & 16.01 TITLE: Know Basic Principles of Law and Its Enforcement.

INSTRUCTIONAL OBJECTIVE - 12.01 & 16.01: Learn Basic Principles of Law And Its Enforcement.

SKILLS: (Process Objectives)

None.

RELATED TECHNICAL INFORMATION:

- Basic principles and definitions of law.
- Courts and court procedures.

REQUIRED INSTRUCTIONAL TIME: 12.01 & 16.01, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

- The student will state the basic definition of law. 100% accuracy.
- The student will explain the levels or classification of the courts in our court system. 80% accuracy.

BLOCK OR DIVISION NUMBER: 12.0 TITLE: Business Law (Accounting) (cont'd.)

16.0 TITLE: Business Law (Business Administration)

TASK NUMBER: 12.02 & 16.02 TITLE: Know Basic Legal Considerations of Contracts.

INSTRUCTIONAL OBJECTIVE - 12.02 & 16.02: Learn Basic Legal Considerations of Contracts.

SKILLS: (Process Objectives)

None.

RELATED TECHNICAL INFORMATION:

- Nature and classes of contracts.
- Principles of offer and acceptance.
- Defective agreements.
- Competency of parties.
- Principles of consideration.
- Illegal agreements.
- Form of contracts.
- Assignment of contracts.
- Termination of contracts.

REQUIRED INSTRUCTIONAL TIME: 12.02 & 16.02, 12 hours.

REQUIRED PERFORMANCE STANDARDS:

- The student will explain difference between:

  1) Express and implied contracts
  2) Void and voidable contracts
  3) Executory and executed contracts
  4) Unilateral and bilateral contracts

  80% accuracy

- The student will identify four conditions that make a contract defective. 100% accuracy.

BLOCK OR DIVISION NUMBER: 12.0 TITLE: Business Law (Accounting) (cont'd.)

16.0 Business Law (Business Administration)

TASK NUMBER: 12.03 & 16.03 TITLE: Know the Legal Considerations Regarding Sales.

INSTRUCTIONAL OBJECTIVE - 12.03 & 16.03: Learn the Legal Considerations Regarding Sales.

SKILLS: (Process Objectives)

None.

RELATED TECHNICAL INFORMATION:

- Sales of personal property.
- Formalities of a sale.
- Transfer of Title and Risk in Sales Contracts.
- Warranties of the seller.

REQUIRED INSTRUCTIONAL TIME: 12.03 & 16.03, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

- The student will identify those points that must be in writing when a written proof of the transaction is required. 80% accuracy.
- The student will define: existing goods, identified goods, future goods, fungible goods. 80% accuracy.

BLOCK OR DIVISION NUMBER: 12.0 TITLE: Business Law (Accounting) (cont'd.)

16.0 TITLE: Business Law (Business Administration)

TASK NUMBER: 12.04 & 16.04 TITLE: Know Legal Considerations of Bailments.

INSTRUCTIONAL OBJECTIVE - 12.04 & 16.04: Learn the Legal Considerations of Bailments.

SKILLS: (Process Objectives)

None.

RELATED TECHNICAL INFORMATION:

- Bailments in general.
- Common carriers.
- Hotelkeepers as Bailees.

REQUIRED INSTRUCTIONAL TIME: 12.04 & 16.04, 4 hours.

REQUIRED PERFORMANCE STANDARDS:

- The student will define and give an example of a bailment. 100% accuracy.
- The student will name three types of losses that are exceptions to liabilities of bailees. 100% accuracy.

BLOCK OR DIVISION NUMBER: 12.0 TITLE: Business Law (Accounting) (cont'd.)

16.0 TITLE: Business Law (Business Administration)

TASK NUMBER: 12.05 & 16.05 TITLE: Know Legal Considerations Regarding Commercial Papers.

INSTRUCTIONAL OBJECTIVE - 12.05 & 16.05: Learn the Legal Considerations Regarding Commercial Papers.

SKILLS: (Process Objectives)

None.

RELATED TECHNICAL INFORMATION:

- Nature of commercial paper.
- Promissory notes: definition, how made, and kinds.
- Drafts: definition, types, and employment.
- Checks: definition, types, and employment.
- Essentials of negotiability.
- Negotiation and discharge: definition and types of indorsements.
- Holders in due course: conditions of immunity.
- Defenses: types.

REQUIRED INSTRUCTIONAL TIME: 12.05 & 16.05, 11 hours.

REQUIRED PERFORMANCE STANDARDS:

- The student will list the 5 kinds of indorsements and explain their usage. 90% accuracy.
- The student will list and explain 2 characteristics of a holder in due course. 100% accuracy.
- The student will demonstrate his ability to fill out a negotiable instrument. 90%.

BLOCK OR DIVISION NUMBER: 12.0 TITLE: Business Law (cont'd.)
(Accounting)

16.0 TITLE: Business Law
(Business Administration)

TASK NUMBER: 12.06 & 16.06 TITLE: Know Legal Considerations of Agency and Employment Relationships.

INSTRUCTIONAL OBJECTIVE - 12.06 & 16.06: Learn Legal Considerations of Agency and Employment Relationships.

SKILLS: (Process Objectives)

None.

RELATED TECHNICAL INFORMATION:

- Creation of an agency.
- Operation and termination of an agency.
- Employer and employee relationships.
- Labor legislation provisions.

REQUIRED INSTRUCTIONAL TIME: 12.06 & 16.06, 5 hours.

REQUIRED PERFORMANCE STANDARDS:

- The student will list and explain 3 duties of an agent to the principal. 90% accuracy.
- The student will list and explain 3 duties of a principal to an agent. 90% accuracy.

BLOCK OR DIVISION NUMBER: 12.0 TITLE: Business Law (cont'd.)
(Accounting)

16.0 TITLE: Business Law
(Business Administration)

TASK NUMBER: 12.07 & 16.07 TITLE: Know the Legal Considerations of Partnerships.

INSTRUCTIONAL OBJECTIVE - 12.07 & 16.07: Learn the Legal Considerations of Partnerships.

SKILLS: (Process Objectives)

None.

RELATED TECHNICAL INFORMATION:

- Formation of a partnership.
- Operation of a partnership.
- Dissolution of a partnership.

REQUIRED INSTRUCTIONAL TIME: 12.07 & 16.07, 4 hours.

REQUIRED PERFORMANCE STANDARDS:

- The student will describe 2 of the 5 possible types of partners in a partnership. 100% accuracy.
- The student will list 5 of the 12 points that must be included in a written agreement for the formation of a partnership. 90% accuracy.
- The student will name 3 of the 5 duties of one partner to another. 80% accuracy.

BLOCK OR DIVISION NUMBER: 12.0 TITLE: Business Law (Accounting) (cont'd.)

16.0 TITLE: Business Law (Business Administration)

TASK NUMBER: 12.08 & 16.08 TITLE: Know the Legal Considerations Regarding Corporations.

INSTRUCTIONAL OBJECTIVE - 12.08 & 16.08 TITLE: Learn the Legal Considerations Regarding Corporations.

SKILLS: (Process Objectives)

None.

RELATED TECHNICAL INFORMATION:

- Nature of a corporation.
- Membership in a corporation.
- Management and dissolution of a corporation.

REQUIRED INSTRUCTIONAL TIME: 12.08 & 16.08, 4 hours.

REQUIRED PERFORMANCE STANDARDS:

- The student will define and list 3 characteristics of a corporation. 100% accuracy.
- The student will explain: common stock, preferred stock, cumulative preferred stock, par-value stock, treasury stock, dividends. 75% accuracy.
- The student will explain 4 of the 7 rights of stockholders of a corporation. 80% accuracy.

BLOCK OR DIVISION NUMBER: 12.0 TITLE: Business Law (Accounting) (cont'd.)

16.0 TITLE: Business Law (Business Administration)

TASK NUMBER: 12.09 & 16.09 TITLE: Know Legal Considerations Regarding Risk-Bearing Devices.

INSTRUCTIONAL OBJECTIVE - 12.09 & 16.09: Learn the Legal Considerations Regarding Risk-Bearing Devices.

SKILLS: (Process Objectives)

None.

RELATED TECHNICAL INFORMATION:

- Nature of insurance.
- Life and annuity insurance.
- Property insurance.
- Automobile insurance.
- Guaranty and suretyship.

REQUIRED INSTRUCTIONAL TIME: 12.09 & 16.09, 8 hours.

REQUIRED PERFORMANCE STANDARDS:

- The student will list the general types of property, life, and health care insurance and briefly explain each with 85% accuracy.
- The student will define a list of common terms used in insurance policies with 90% accuracy.
- The student will explain the workmen's compensation plan as it applies to employers with 85% accuracy.

BLOCK OR DIVISION NUMBER: 12.0 TITLE: Business Law (Accounting) (cont'd.)

16.0 TITLE: Business Law (Business Administration)

TASK NUMBER: 12.10 & 16.10 TITLE: Know Legal Considerations Regarding Property.

INSTRUCTIONAL OBJECTIVE - 12.10 & 16.10: Learn the Legal Considerations Regarding Property.

SKILLS: (Process Objectives)

None.

RELATED TECHNICAL INFORMATION:

- Nature of property.
- Transfer of real property.
- Real estate mortgages.
- Landlord and tenant.
- Wills and inheritances.
- Bankruptcy.

REQUIRED INSTRUCTIONAL TIME: 12.10 & 16.10, 8 hours.

REQUIRED PERFORMANCE STANDARDS:

- The student will define and give an example of real property and personal property. 100% accuracy.
- The student will name and explain 4 of the 6 characteristics of a deed. 90% accuracy.
- The student will explain the rights of a landlord in regard to leased property. 85% accuracy.
- The student will define the following terms common to wills: testator, devisee, bequest, legacy, executor, intestate, administrator. 80% accuracy.
- The student will list 3 of the 6 types of obligat ns that cannot be avoided by bankruptcy. 90% accuracy.

TEST ITEMS
(Outline Type)

Accounting - Business Administration

BLOCK OR DIVISION NUMBER: 12.0 TITLE: Business Law
(Accounting)

16.0 TITLE: Bus ness Law
(Business Administration)

.01 The student will explain the functions of the various levels of courts in our court system. 80% accuracy.

.02 The student will briefly define "contract" and then explain any 4 of the following types of contracts: void, voidable, executory, executed, unilateral, bilateral, formal, or quasi contract. 85% accuracy.

.03 a) The student will identify those points that must be in writing when a written proof of the transaction is required. 80% accuracy.
b) Given a list of terms associated with sales, the student will define the terms. 80% accuracy.

.04 The student will define bailment and give 2 examples of bailees. 90% accuracy.

.05 The student will list the five kinds of indorsements and explain their usage, 90% accuracy.
The student will list and explain the three characteristics of a holder in due course, 90% accuracy.
The student will explain the necessary parts of a negotiable instrument. 90% accuracy.

.06 The student will list and explain the main duties and rights of agents and principals with 85% accuracy.

.07 a) The student will name 3 of the 5 duties of one partner to another. 90% accuracy.
b) The student will list 3 points that describe a partnership. 90% accuracy.

.08 a) The student will define and list 3 characteristics of a corporation. 90% accuracy.
b) Given a list of terms associated with corporations, the student will correctly identify the terms. 85% accuracy.

.09 The student will list the general types of property, life, and health care insurance and briefly explain each with 85% accuracy.
The student will define a list of common terms used in insurance policies with 85% accuracy.

TEST ITEMS
(cont'd.)

.09 The student will explain the workmen's compensation plan as it applies to employers with 85% accuracy.

.10 Given a list of terms associated with property, deeds, wills, and bankruptcy proceedings, the student will correctly identif the terms, 85% accuracy.

"SUGGESTED SAMPLE"

ARTICULATION RESEARCH PROJECT
JAMES SPRUNT INSTITUTE AND DUPLIN COUNTY PUBLIC HIGH SCHOOLS

Student Vocational Skills Record

COURSE: Personal Development, Block 1.0

(For Instructor's File)

NAME: _____ DATE: _____

CERTIFIED BY: _____ TITLE: _____

INSTITUTION: _____

CODE	TASKS	CODE	TASKS
[U L M S]	Uses proper techniques for good body care.	[U L M S]	Practices good business ethics.
[U L M S]	Maintains neat, well groomed appearance.	[U L M S]	Practices telephone courtesy.
[U L M S]	Dresses appropriately.	[U L M S]	Displays physical poise.
[U L M S]	Displays proper attitude toward work.	[U L M S]	Meets public tactfully.
		[U L M S]	Practices appropriate etiquette.

GENERAL ATTITUDE:

[U L M S] Industrious and energetic

[U L M S] Cooperative with associates and instructors.

[U L M S] Dependable

[U L M S] Punctual

CODE - Circle appropriate letter.

U - Unqualified
L - Limited skill, requires supervision.
M - Moderate skill, requires minimum supervision.
S - Skilled, works independently.